



TVEMEA - Zeiss HOL

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1. Access



Adobe X ZEISS HoL

Accessing the Experience platform

- Use Chrome or Firefox.
- **Sign-out from all Adobe instances** that might be open.
- Do **NOT** use your own credentials to access the demo instance for this lab. Instead, you'll use specific credentials provided in this document.

Hands-on Lab URLs

<https://experience.adobe.com/> Experience Cloud Home Page

<https://platform.adobe.com/> Opens Experience Platform Directly

Your user information

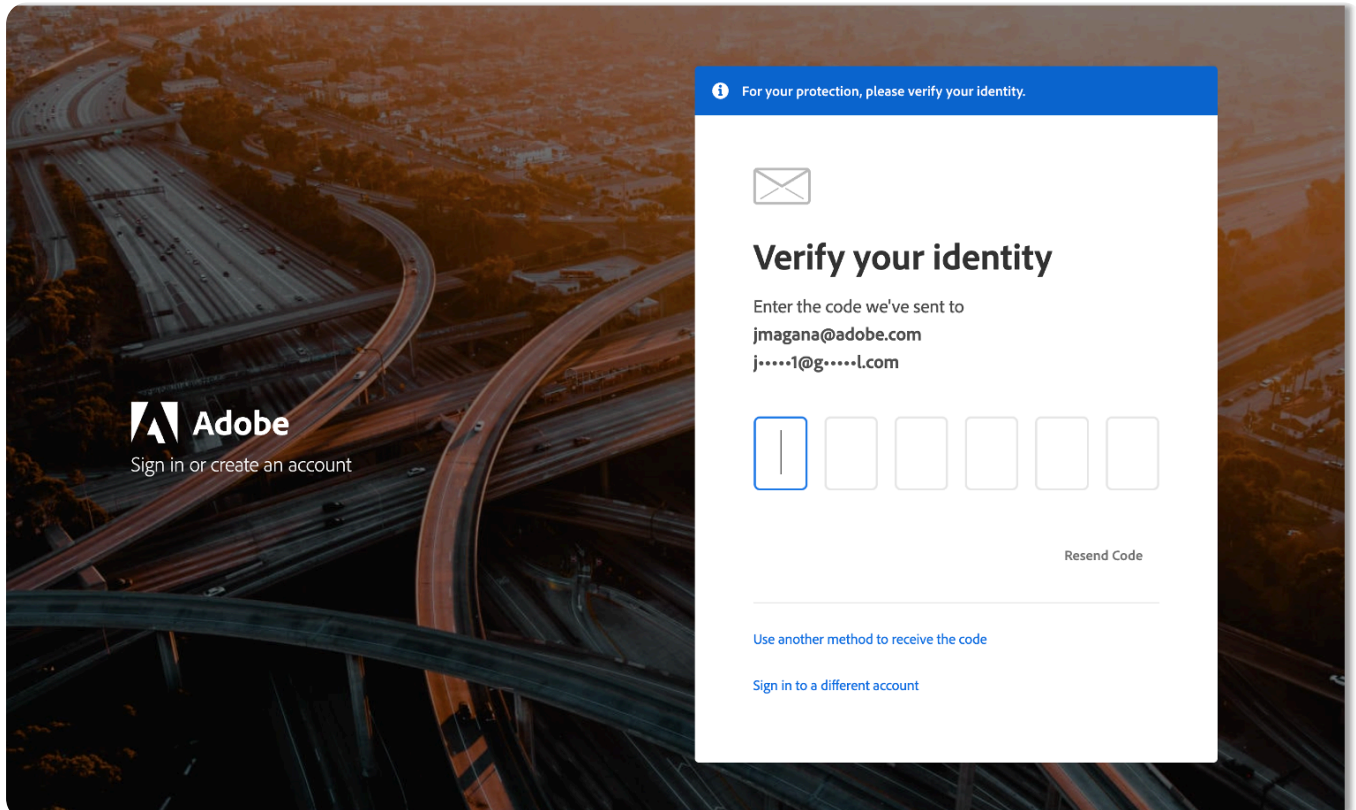
Password: Zeiss_Adobe2026!

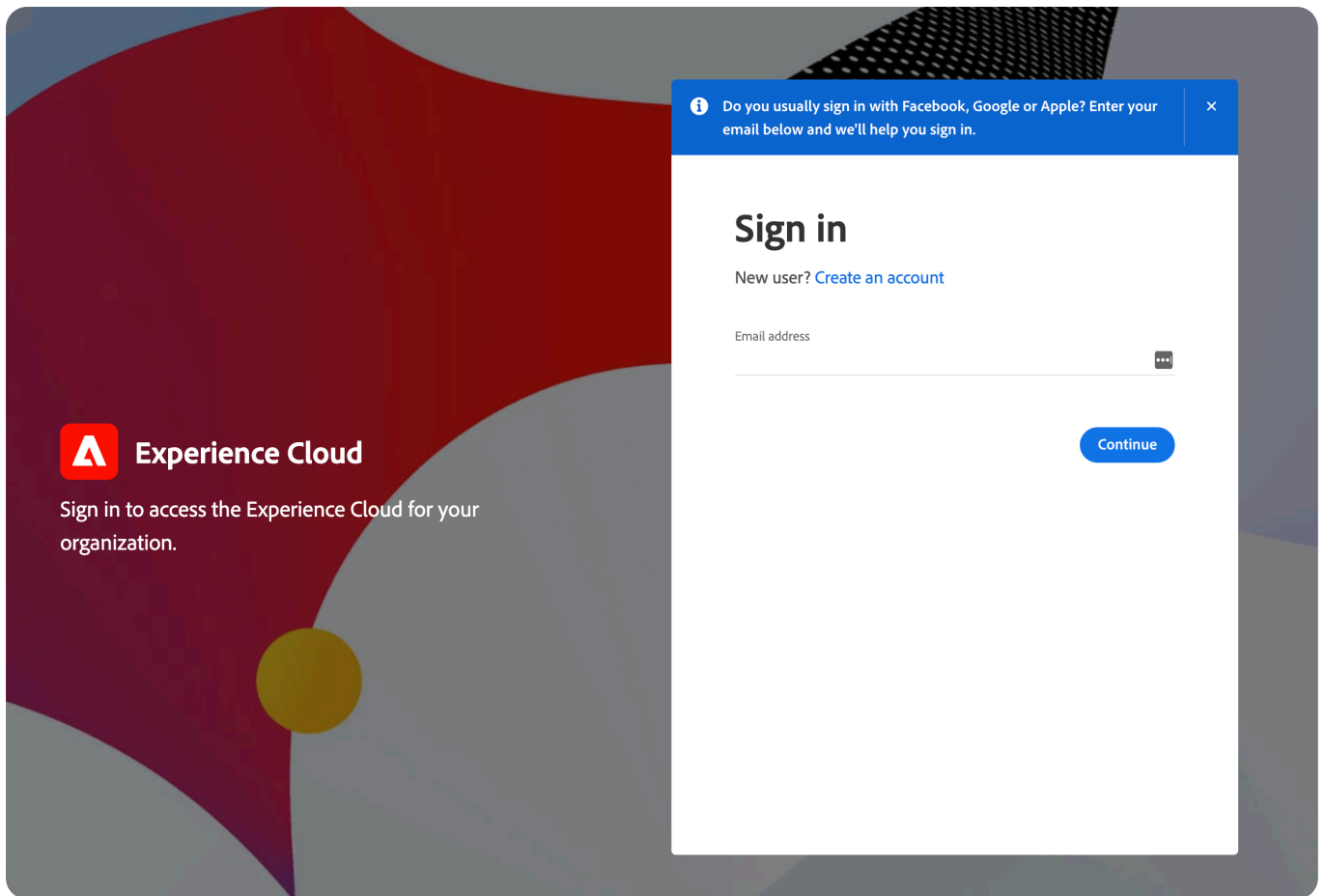
User	Name	Username
01	Dominik Schröder	zeiss_u01@emea.aephandsonlabs.com
02	Michael Hebig	zeiss_u02@emea.aephandsonlabs.com
03	Stefan Pabst	zeiss_u03@emea.aephandsonlabs.com
04	Torben Kolbe	zeiss_u04@emea.aephandsonlabs.com
05	Immanuel Dobler	zeiss_u05@emea.aephandsonlabs.com
06	Matteo Pedrotti	zeiss_u06@emea.aephandsonlabs.com
07	Anna Schwab	zeiss_u07@emea.aephandsonlabs.com
08	Lukas Schiele	zeiss_u08@emea.aephandsonlabs.com
09	Jan Matzkovits	zeiss_u09@emea.aephandsonlabs.com
10	Horst Schulze	zeiss_u10@emea.aephandsonlabs.com
11	Simone Fumagalli	zeiss_u11@emea.aephandsonlabs.com
12	Dirk Hendel	zeiss_u12@emea.aephandsonlabs.com
13	Simon Dittlmann	zeiss_u13@emea.aephandsonlabs.com
14	Pascal Reder	zeiss_u14@emea.aephandsonlabs.com
15	Santosh Kumar	zeiss_u15@emea.aephandsonlabs.com
16	Sarvesh Mulay	zeiss_u16@emea.aephandsonlabs.com
17	Alexander Wahl	zeiss_u17@emea.aephandsonlabs.com
18	Dennis Luckas	zeiss_u18@emea.aephandsonlabs.com
19	Dominic Mruk	zeiss_u19@emea.aephandsonlabs.com
20	Anna Schmitz	zeiss_u20@emea.aephandsonlabs.com
21	Jason Amughor	zeiss_u21@emea.aephandsonlabs.com
22	Lorenz Haas	zeiss_u22@emea.aephandsonlabs.com
23	Manuel Winning	zeiss_u23@emea.aephandsonlabs.com
24	Ludivine Martin	zeiss_u24@emea.aephandsonlabs.com

⚠ If asked to send a verification code, please proceed. You should see a screen like this. Please give a few minutes and we will provide you the verification code via the chat per your username as assigned on the credentials table above.

Do not enter your mobile number, if prompted.

/





If you're asked to add in any additional data or to add a mobile number as part of your sign-in, **please ignore these prompts** and if allowed skip or otherwise ignore or complete the step with the defaults. If you have problems logging in, alert your presenter immediately.

After Successfully Login

Good morning, Juan!

Recents

NAME	TYPE	STATUS	CREATED BY	MODIFIED ON
Demo System - Event Dataset for Website (Global v1.1)	Dataset	-	33b84e8-cf71-4278-a558-4b738dfb397...	June 28, 2023
DG - Scenario 1 - Triggered Offer	Journey	Draft	Rishabh Vinod	June 28, 2023
DG - Scenario 2 - Cross Channel Journey	Journey	Draft	Rishabh Vinod	June 28, 2023
DG - Scenario 5 - Coupon Personalization	Journey	Draft	Rishabh Vinod	June 28, 2023
Web Events Dataset v0	Dataset	-	15f4f217-7297-4605-be5d-d2c0ba4dc43...	June 27, 2023

[Show more](#)

Quick access

[View all](#)[Admin \(Beta\)](#)[Admin Console](#)[Analytics](#)[App Builder Catalog](#)[Audience Manager](#)[Customer Journey Analytics](#)[Data Collection](#)[Experience Manager](#)[Experience Manager Assets](#)[Experience Platform](#)[Journey Optimizer](#)[Permissions](#)[Privacy UI](#)[Software Distribution](#)[System Status](#)[Target](#)

2. [Bonus] Postman for APIs

This section describes the prerequisites for successfully executing the API requests using the Adobe Experience Platform APIs.

Postman

In order to complete the exercises, you will need to perform authentication and HTTP requests. For ease of use, our suggestion is the use of Postman.

Installation

To install Postman:

1. Go to <https://postman.com>.
2. Click on the icon of the operating system you use.
3. Click on the link to download the correct version.
4. Install the app.

Download Collection & Environment

In Postman, there are 2 concepts: **Environments** and **Collections**.

- The *Environment* contains all of your environmental variables which are more or less consistent. In the *Environment*, you'll find things like the IMSOrg of the Platform environment, alongside security credentials like your private key and others. The environment file is named `XXX.postman_environment.json`.
- The *Collection* contains a number of API requests that you can use. We have bundled these in a file named `XXX.postman_collection.json`.

We have combined both files in a ZIP file for you. To access:

1. Download the environment and collection below.
2. Extract the zip-file to a location on your computer.

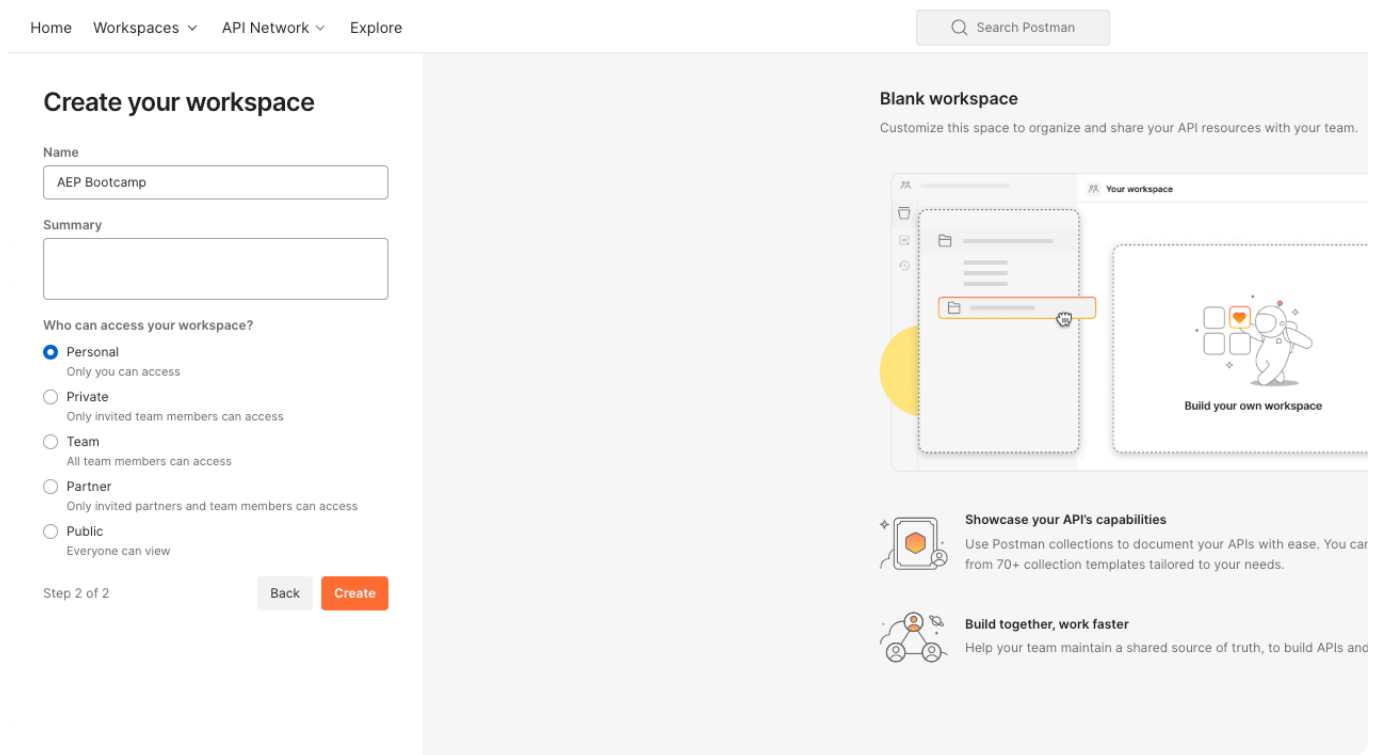
 **DEMO POT EMEA - sb01.zip**



Setup

To setup Postman with the correct Collection and Environment:

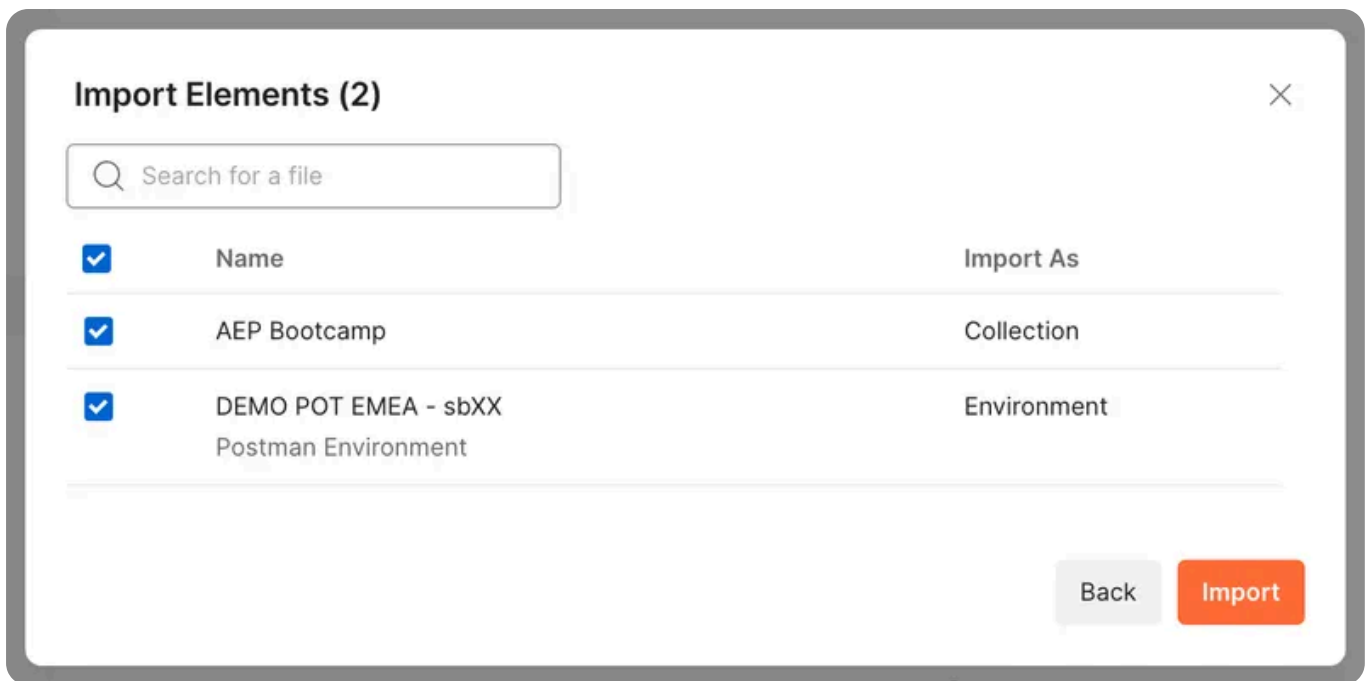
1. open Postman.
2. Click on **Workspaces** dropdown menu and select **Create Workspace**.
3. In the **Create workspace** screen, select **Blank workspace**, and enter **AEP Bootcamp** as the **Name**.
4. Select **Personal** for **Visibility**.
5. Click on **Create Workspace**.



Once your workspace is created you can import the environment and the collection:

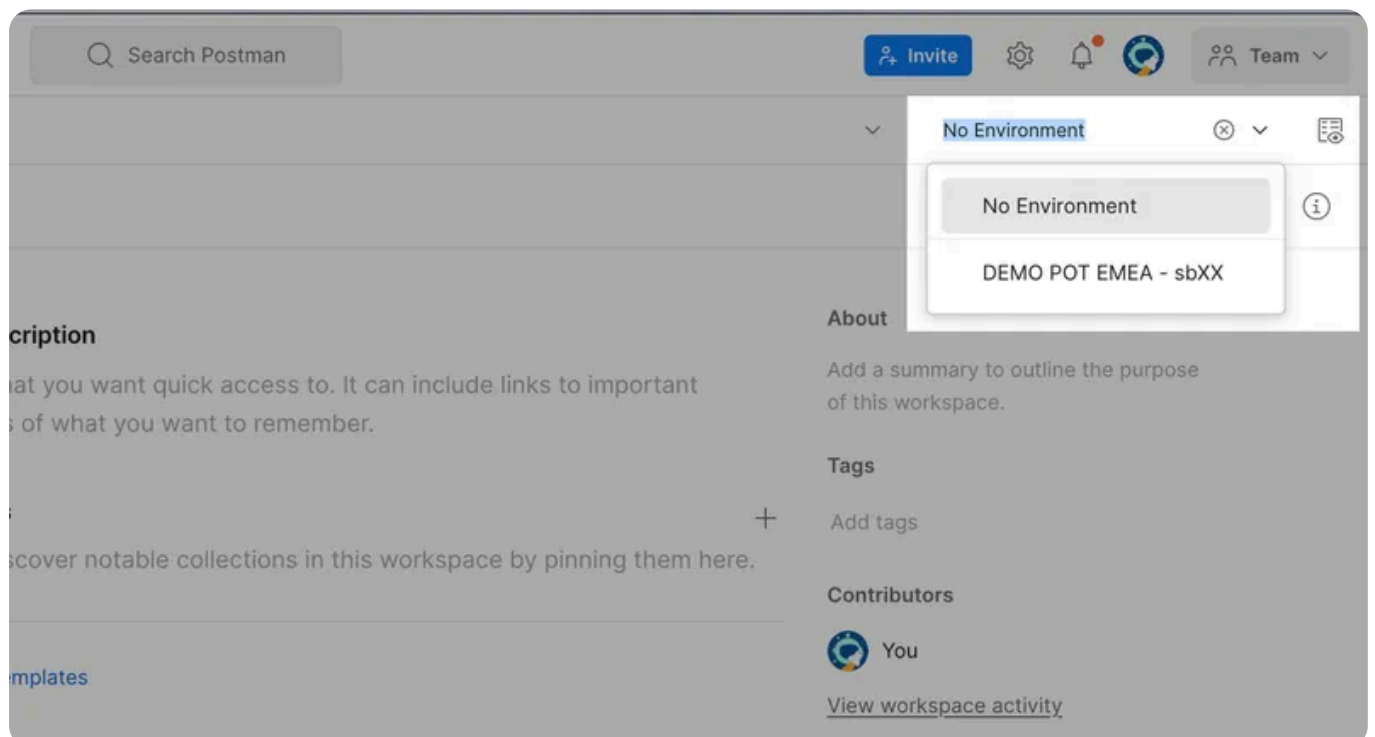
1. Click on **Import**.
2. In the **Import** dialog, drop in your environment and collection JSON files.
3. Select the two files that you have just unzipped as part of the "Download" phase and confirm your selection.

Postman shows you an **Import** dialog.



**sbXX will be replaced with the number of the sandbox you're going to use. (for example sb21)*

- Click on **Import**. Both files will be imported. You will see your imported collection in the left panel.
- Select **DEMO POT EMEA - sb01** from the **No Environment** dropdown list.



You now have your Postman configured correctly.

3. Lab 1: Real-time Customer Profile

Overview

In this module, we will do a deep dive into the Real-time Customer Profile and Identity capabilities of Adobe Experience Platform.

You will learn how profiles can be defined, and how to define segment builder queries to define your own audiences.

Learning Objectives

- Learn how to visualise a customer's Real-time Customer Profile through Adobe Experience Platform's UI.
- Learn how to create an audience using Adobe Experience Platform's Audience Builder.
- Learn about the impact of having access to a full customer profile, including real-time behaviour, from any environment.

3.1. Visualise Your Profile

In this exercise you will use the AEP UI to view your real-time customer profile.

In Adobe's Real-time Customer Profile, all profile data is shown alongside event data, as well as existing audience memberships. The data shown can come from anywhere, from Adobe applications and external solutions. This is the most powerful view in Adobe Experience Platform, the true experience system of record.

Use the Customer Profile View

To log into the Adobe Experience Platform, check the [Access](#).

1. In the left rail, click on **Customer** and choose **Profiles**.
2. On the **Profiles** tab, click on **Browse**.

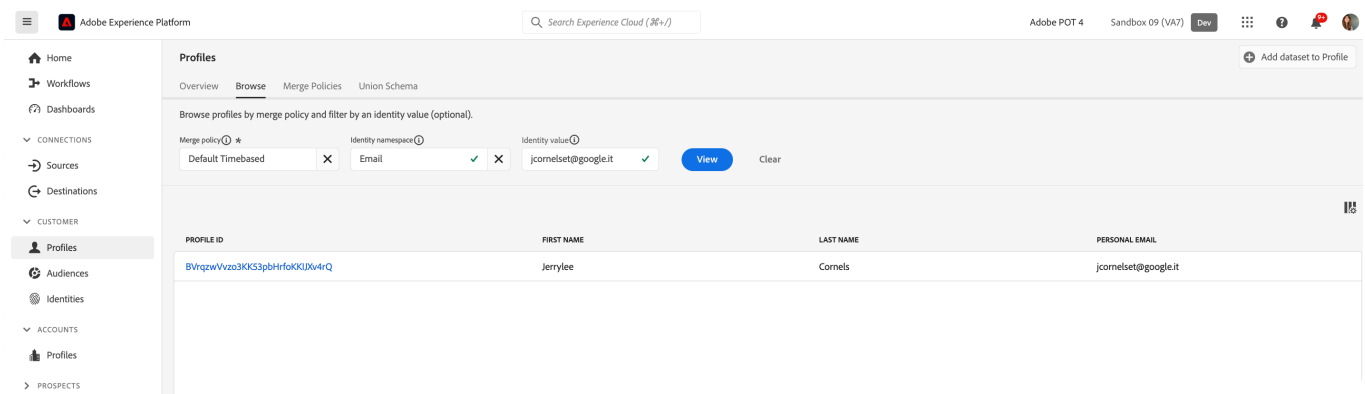
With Adobe Experience Platform, all IDs are equally important. Previously, the Adobe ID was the most important ID in the Adobe context and all other IDs were linked to the ECID in a hierarchical relation. With AEP this is no longer the case, and every ID can be considered a primary identifier.

Typically, the primary identifier depends on the context.

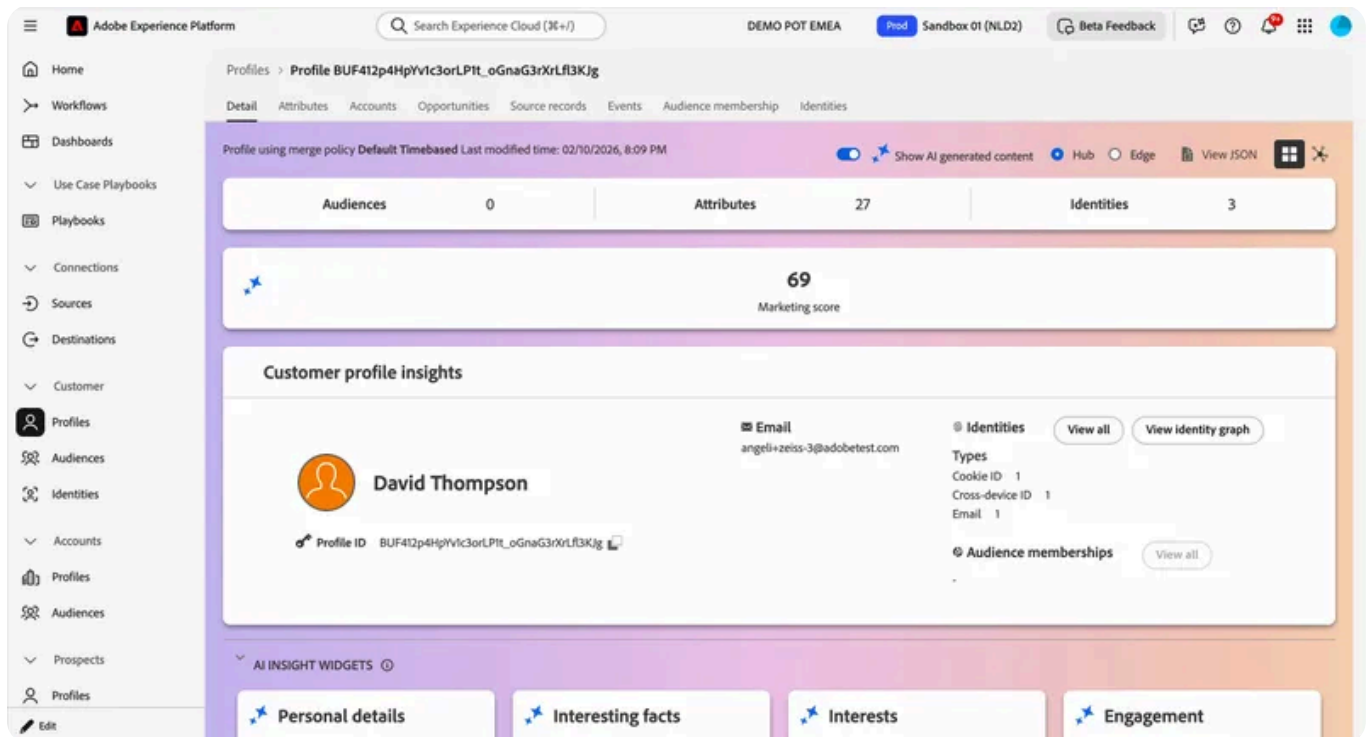
- If you ask your Call Center, "*What is the most important ID?*", they will probably answer, "*the phone number!*".
- But if you ask your CRM team, they will answer, "*the email address!*".

Adobe Experience Platform understands this complexity and manages it for you. Every application, whether an Adobe application or non-Adobe application, will speak with Adobe Experience Platform by referring to the ID they consider primary. And it simply works!

1. For the field **Identity namespace**, select **Email**.
2. For the field **Identity Value** enter the your ZEISS email address.
3. Click **View**. You'll then see your profile in the list.
4. Click the **Profile ID** to open your profile.



You now see an overview of **Profile Attributes, Identities and Events** for your customer profile. This user interface is customisable.



If you'd like to see all available Profile Attributes for your profile,

1. Click on **Attributes** at the tab bar of overview panel.

Adobe Experience Platform

Search Experience Cloud (86+)

Adobe POT 4 Sandbox 09 (VA7) Dev

Home Workflows Dashboards CONNECTIONS Sources Destinations CUSTOMER Profiles Audiences Identities ACCOUNTS Profiles PROSPECTS PRIVACY Policies Requests Audits DATA SCIENCE Notebooks Models Services DATA MANAGEMENT Schemas Places

Profiles > Profile BlqqCgrs6_tf_dev-def9efPQA

Detail Attributes Accounts Opportunities Source records Events Audience membership

Profile using merge policy Default Timebased Last modified time: 09/21/2023, 3:20 AM

Q

View JSON

ATTRIBUTE	VALUE	PATH
_id	-	_id
address	jcornelset@google.it	personalEmail.address
age	52	_adobeamericaspot4.individualRecognition.core.age
age	52	_adobeamericaspot4.individualCharacteristics.core.age
birthDate	1971-10-13T00:00:00Z	person.birthDate
birthDayAndMonth	10-13	person.birthDayAndMonth
birthYear	1971	person.birthYear
city	-	homeAddress.city
country	-	homeAddress.country
countryCode	FR	homeAddress.countryCode
crmId	4WtIIP	_adobeamericaspot4.identification.core.crmId
ecid	71223423053543148265623415250005203371	_adobeamericaspot4.identification.core.ecid
email	jcornelset@google.it	_adobeamericaspot4.identification.core.email
firstName	Jerrylee	person.name.firstName
fullName	Jerrylee Cornels	person.name.fullName
gender	female	_adobeamericaspot4.individualRecognition.core.gender

To see all entries for every experience event that is linked to your profile:

1. Click on **Events** at the tab bar.
2. You can click on **View all** for each event to see more details of a specific experience event.

Adobe Experience Platform

Search Experience Cloud (86+)

Adobe POT 4 Sandbox 09 (VA7) Dev

Home Workflows Dashboards CONNECTIONS Sources Destinations CUSTOMER Profiles Audiences Identities ACCOUNTS Profiles PROSPECTS PRIVACY Policies Requests Audits DATA SCIENCE Notebooks Models Services DATA MANAGEMENT Schemas Places Datasets

Profiles > Profile BlqqCgrs6_tf_dev-def9efPQA

Detail Attributes Accounts Opportunities Source records Events Audience membership

Profile using merge policy Default Timebased Last modified time: 09/21/2023, 3:20 AM

View JSON

web.webpagedetails.pageViews
09/18/2023, 12:59 AM [View all](#)

ATTRIBUTE	VALUE	PATH
duration	1	environment.duration
id	4WtIIP	identityMap.crmId.0.id
id	+1 916 515 1589	identityMap.phone.0.id
id	jcornelset@google.it	identityMap.email.0.id
id	7445210764322478820211578624004801084	identityMap.ecid.0.id

commerce.orders
09/18/2023, 12:59 AM [View all](#)

ATTRIBUTE	VALUE	PATH
duration	6	environment.duration
id	4WtIIP	identityMap.crmId.0.id
id	+1 916 515 1589	identityMap.phone.0.id
id	jcornelset@google.it	identityMap.email.0.id
id	7445210764322478820211578624004801084	identityMap.ecid.0.id

To see all audiences that this profile belongs to (we will discuss more about Audiences in the next exercise):

1. Click on **Audience Membership** at the tab bar.

Adobe Experience Platform

Search Experience Cloud (86+)

Adobe POT 4Sandbox 09 (VA7)Dev

Home

Workflows

Dashboards

CONNECTIONS

Sources

Destinations

CUSTOMER

Profiles

Audiences

Identities

ACCOUNTS

Profiles

PROSPECTS

PRIVACY

Policies

Requests

Audits

DATA SCIENCE

Notebooks

Models

Services

DATA MANAGEMENT

Schemas

Places

Profiles > Profile BlqqCgRse_tf_dev-def9efPQA

DetailAttributesAccountsOpportunitiesSource recordsEventsAudience membership

Audience Name	Description	Merge Policy	Origin	Audience ID	Last Modified
sacker - API - All Female Cust...		Default Timebased	Real-time Customer Profile	7fd66b3d-c2c6-4375-9d8f-3060...	09/20/2023, 3:47 PM
WKND Fly - Mobile app users		Default Timebased	Real-time Customer Profile	50440820-f6b-4eb9-9738-01de...	09/19/2023, 10:25 AM
WKND Fly - WKND Fly Club Pro...		Default Timebased	Real-time Customer Profile	ceaa2ffc-clb4-4695-9c02-e5767...	09/15/2023, 11:45 AM

Audience membership

Total results

3

You have now successfully viewed your customer profile in Adobe Experience Platform.

Now that you've learned how to view any customer's real-time profile by making use of AEP's User Interface, let's create an audience which your profile will qualify for.

3.2. Create an Audience

In this exercise, you will create an audience that identifies customers who have reached the *consideration* stage of their journey. This audience represents the moment when customers are ready for more in-depth engagement, enabling ZEISS to trigger timely and relevant communications through journey orchestration.

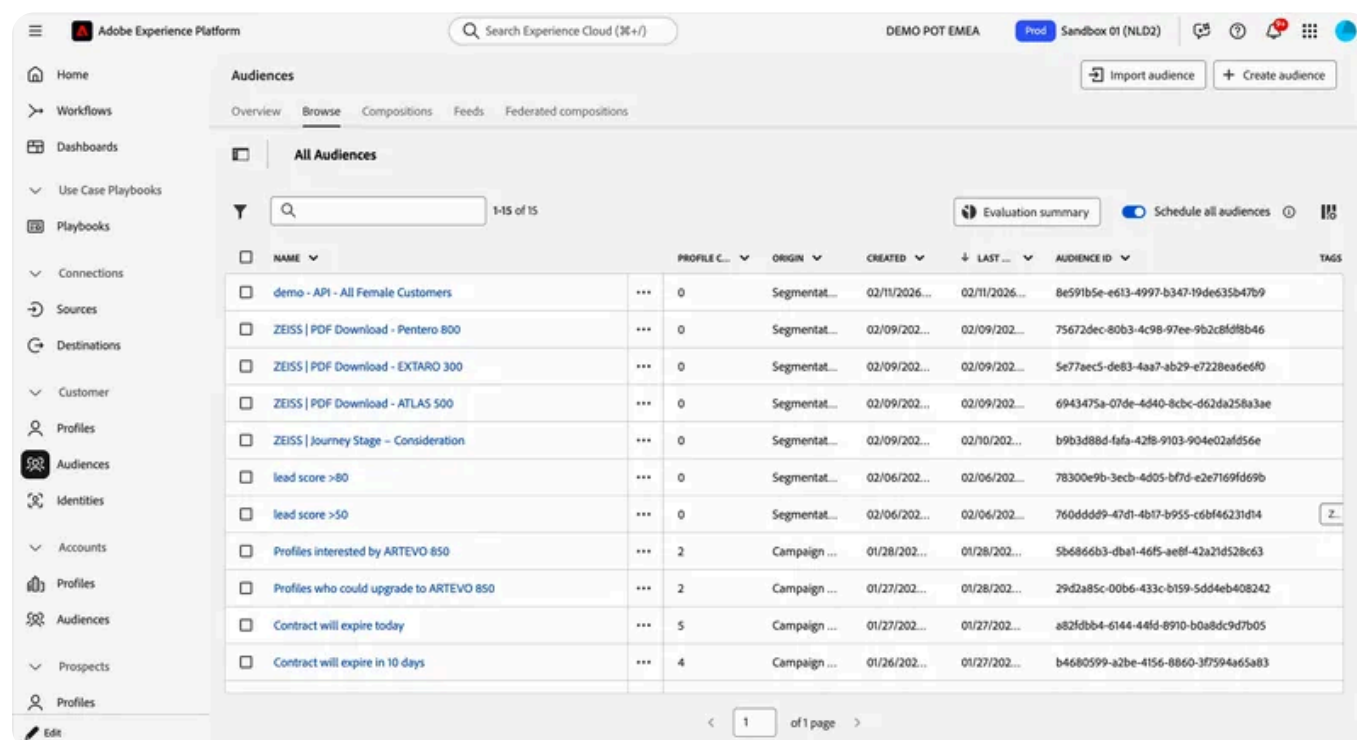
You'll create the Audience by making use of Adobe Experience Platform's Audience Builder.

Audience Overview

To log into the Adobe Experience Platform, check the [Access](#) section.

To get an overview of available audiences in Adobe Experience Platform:

1. In the menu on the left side, click on **Customer > Audiences**. You will see a dashboard overview with information on a specific audience.
2. Click on **Browse** at the tab bar. You will see an overview of all existing audiences.



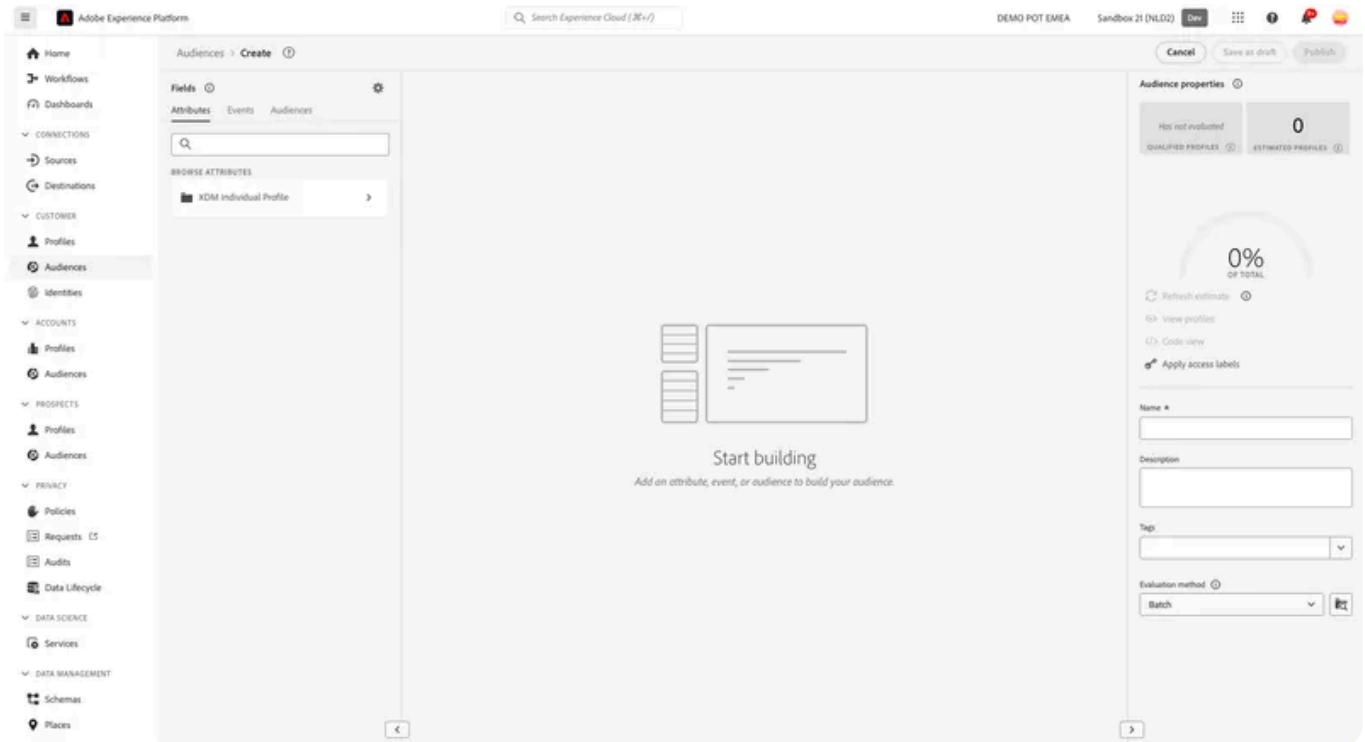
The screenshot shows the Adobe Experience Platform interface. On the left is a navigation menu with options like Home, Workflows, Dashboards, Use Case Playbooks, Playbooks, Connections, Sources, Destinations, Customer, Profiles, Audiences (selected), Identities, Accounts, Profiles, Audiences, and Prospects. The main area is titled 'Audiences' and has tabs for Overview, Browse (selected), Compositions, Feeds, and Federated compositions. Below the tabs is a search bar and a filter icon. A table lists various audiences with columns for NAME, PROFILE C., ORIGIN, CREATED, LAST, AUDIENCE ID, and TAGS. The table contains 15 rows of audience data.

NAME	PROFILE C.	ORIGIN	CREATED	LAST	AUDIENCE ID	TAGS
demo - API - All Female Customers	...	0	Segmentat...	02/11/2026...	02/11/2026...	8e591b5e-e613-4997-b347-19de635b47b9
ZEISS PDF Download - Pentero 800	...	0	Segmentat...	02/09/202...	02/09/202...	75672dec-80b3-4c98-97ee-9b2c8f8b46
ZEISS PDF Download - EXTARO 300	...	0	Segmentat...	02/09/202...	02/09/202...	5e77aec5-de83-4aa7-ab29-e7228ea6e6f0
ZEISS PDF Download - ATLAS 500	...	0	Segmentat...	02/09/202...	02/09/202...	6943475a-07de-4d40-8cbc-d62da258a3ae
ZEISS Journey Stage - Consideration	...	0	Segmentat...	02/09/202...	02/10/202...	b9b3d88d-fafa-42f8-9103-904e02af556e
lead score >80	...	0	Segmentat...	02/06/202...	02/06/202...	78300e9b-3ecb-4d05-bf7d-e2e7169fd69b
lead score >50	...	0	Segmentat...	02/06/202...	02/06/202...	760dddd9-47d1-4b17-b955-c6bf46231d14
Profiles interested by ARTEVO 850	...	2	Campaign ...	01/28/202...	01/28/202...	5b6866b3-dba1-46f5-ae8f-42a21d528c63
Profiles who could upgrade to ARTEVO 850	...	2	Campaign ...	01/27/202...	01/28/202...	29d2a85c-00b6-433c-b159-5dd4eb408242
Contract will expire today	...	5	Campaign ...	01/27/202...	01/27/202...	a82fdbb4-6144-44fd-8910-b0a8dc9d7b05
Contract will expire in 10 days	...	4	Campaign ...	01/26/202...	01/27/202...	b4680599-a2be-4156-8860-3f7594a65a83

Create an audience

We want to create a rule that will select all customer profiles that have a marketing score between 30 and 60.

1. Click on **+ Create Audience**. This will open the Create Audience popup.
2. Select **Build Rule** as the create method. This will open the Rule Builder. You will immediately notice the **Attributes** tab selected underneath **Fields**. As well as the **XDM Individual Profile** selector under **BROWSE ATTRIBUTES**.



Since XDM is the language that powers the experience business, it is also the foundation for the audience builder. All data that is ingested in AEP should be mapped against XDM, and as such, all data becomes part of the same data model regardless of where that data comes from. This gives you a big advantage when building audiences, as from this one Segment Builder UI, you can combine data from any origin in the same workflow.

Audiences can be sent to solutions like Adobe Target, Adobe Campaign and other destinations for activation.

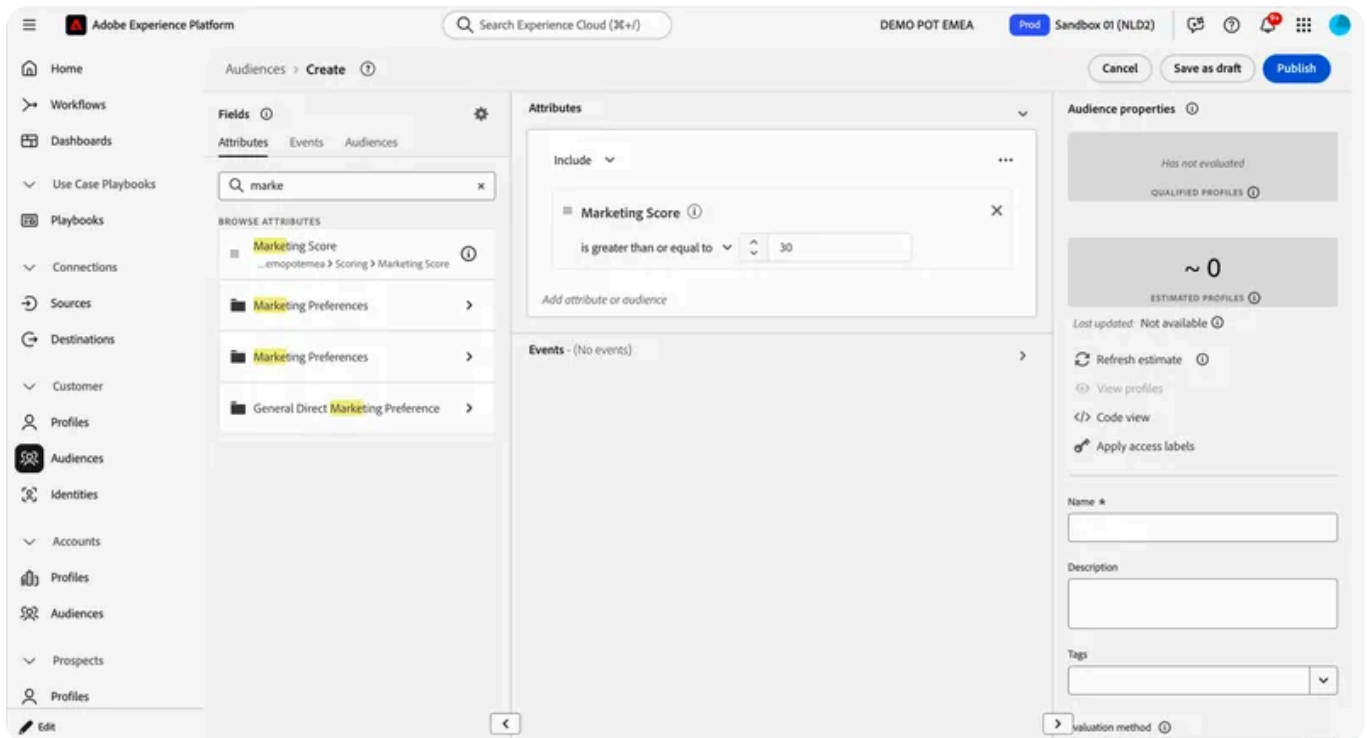
Add attribute

Let's build an audience:

1. Select the **Attributes** tab in the Fields section.
2. In the text search field, type **marketing**. You will see **Marketing Score** listed under **Browse Attributes**.

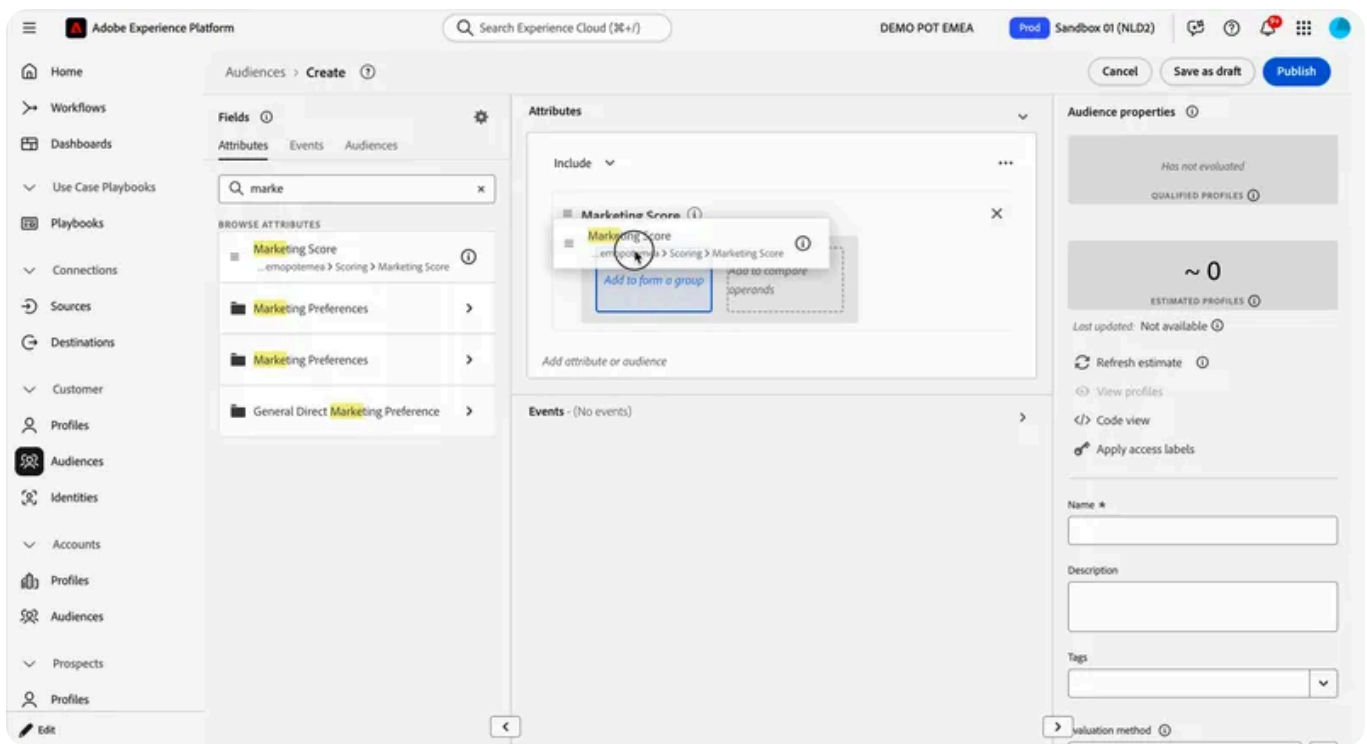
3. Drag the **Marketing Score** event type onto the canvas where it says **Start building**.
4. Change the operator to **is greater than or equal to**.
5. Type **30** in the text box.

Your screen should look like:



Now we need to set the upper bound for the marketing score range:

1. from the **Fields** list, drag **Marketing Score** drop it in the canvas over the previous one; drop in the area called **Add to form a group**.
2. Change the operator to **less than**.
3. Type **60** in the text box.



At each step in defining your audience, you can get an estimate of the audience's population:

- Click on **Refresh Estimates**, on the right-hand panel

You will then see an estimation of your current audience size. This is very helpful for a business user, so that they can see the impact of certain attributes on the resulting audience size.

IMPORTANT: the sandbox you're using for the exercise has been reset before the lab, so Refresh Estimate will likely returns 0.

For more details on how estimate works, see the [documentation](#).

Code View

So far, you've only used the UI to build your audience, but there's also a code-option to build an audience.

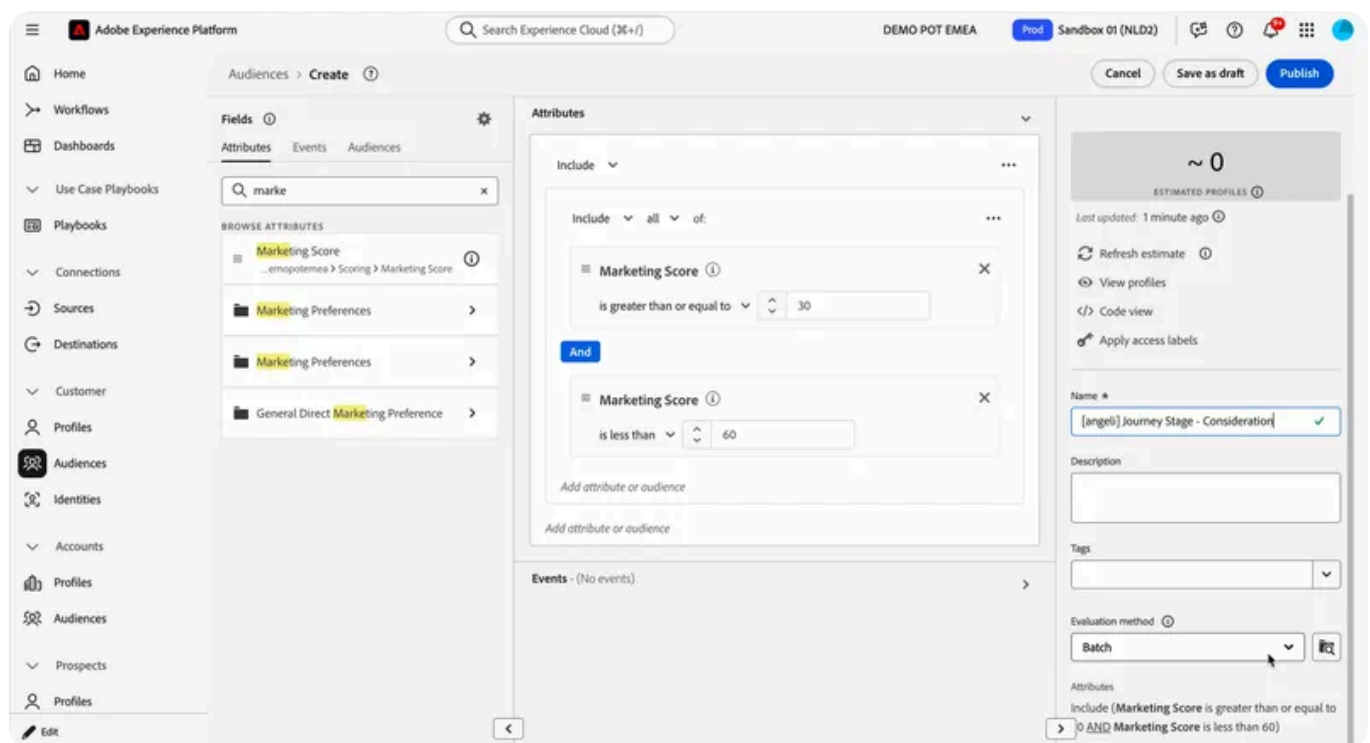
When building an audience, you're actually composing a Profile Query Language (PQL) query. To visualise the PQL code,

1. Click on the **Code View** switcher in the upper right corner of the Audience builder.
2. Click on **Segment Builder view** to return back to the UI.

Publish audience

Let's publish our audience.

1. Enter a **Name** for your audience using the following naming convention, e.g. [your name] Journey Stage – Consideration .
2. (optional) Enter a **Description**.
3. Select **Batch** from the **Evaluation method** dropdown list. You can read more about evaluation methods [here](#).
4. Click on **Publish**.



You will be taken to the **Audience summary** screen, outlining your audience definition.

You have now successfully created an audience using the Adobe Experience Platform Audience Builder.

3.3. [Bonus] Visualise your Profile using APIs

In this exercise, you'll use Postman and Adobe I/O to query Adobe Experience Platform's APIs to view your own real-time customer profile.

In the Real-time Customer Profile, all profile data is shown alongside event data, as well as existing segment memberships. The data shown can come from anywhere, from Adobe applications and external solutions. This is the most powerful view in Adobe Experience Platform, the experience system of record.

The Real-time Customer Profile can be consumed by all Adobe applications, but also by external solutions like call centers or in-store clienteling apps. The way to do this is to connect those external solutions to Adobe Experience Platform's APIs.

Your Identifiers

As we have seen, on the **REAL TIME CUSTOMER PROFILE** panel on the website, you can find multiple identities. Every identity is linked to a namespace.

Identity	Namespace
EXPERIENCE CLOUD ID	83433386964176742472712675204149950968
EMAIL	sacker+2004-1@adobetest.com
PHONE NUMBER	+447929141042+2004-1
FREQUENT FLYER ID	123124

We can use any of these identifiers to look up a profile.

Set up your Adobe Developer Project

This section is for information purpose only. We have already done it for you and have packed it up in the Postman collection and environment you installed.

See [Introduction section](#) for more information.

In order to use APIs to create a profile, look up your profile, create an audience, i.e. do anything programmatically against Adobe Experience Platform, you need to setup an integration project in the [Adobe Developer Console](#).

Such a project takes care of setting up the integration, and more importantly, the authorization and authentication. To maintain the security of your applications and users, all requests to Experience Platform APIs must be authenticated and authorized using standards such as OAuth.

For more information on how to gather the required credentials and authenticate Platform API calls, you can refer to our [authentication tutorial](#).

Luckily, [we have all done this for you already](#). Result is a ready-to-use integration configuration you can use with Postman.

Authenticate using Postman

To follow this part of the hands-on-lab, ensure you have:

- installed Postman;
- downloaded the ZIP file containing environment and collection;
- configured Postman environment.

See [Introduction section](#) for more information.

Before we can visualise a profile using the API, we first need to authenticate. To do so:

1. Open the **AEP Bootcamp** collection.
2. Ensure that the correct Environment **DEMO POT EMEA - sb01** is selected from the top right environment drop down.
3. Select **POST Request access token**. It will now be displayed in the middle of your screen.
4. Click on **Send**.

You will see a response displayed in the **Body** section. You will see an access token with a specific value and expiration window (`expires_in`). The token is automatically saved in your environment to be reused in the next API calls.

The token that we've received is valid for 24 hours. This means that after 24 hours, you will have to generate a new token by running this request again.

[illegible]

Real-time Customer Profile API

Profile Request

Now that you have authenticated, you can go ahead and send your first real request to AEP's Real-time Customer Profile API's.

1. Ensure you have opened the **AEP Bootcamp** collection.
2. Open the **Real-time Customer Profile API** folder.
3. Select the **GET Retrieve a Profile by Entity Id and Namespace** request.

For this request, there are three required query parameters, as visualised in the **Params** section.

POST Request Access Token

GET Retrieve a Profile by Entity ID

+

Credential in AEP Bootcamp

AEP Bootcamp - Sandbox 09 / Real-time Customer Profile API

Retrieve a Profile by Entity Id and Namespace

Save

GET

https://platform.adobe.io/data/core/ups/access/entities?schema.name=_xdm.context.profile&entityId=77597939501748073400468533653363056759&entityIdNS=ecid

Send

Params

Authorization

Headers (12)

Body

Pre-request Script

Tests

Settings

Cookies

Query Params

	Key	Value	Description	...	Bulk Edit
☒	schema.name	_xdm.context.profile			
☐	relatedSchema.name	{{relatedSchema.name}}			
☒	entityId	77597939501748073400468533653363056759			
☒	entityIdNS	ecid			

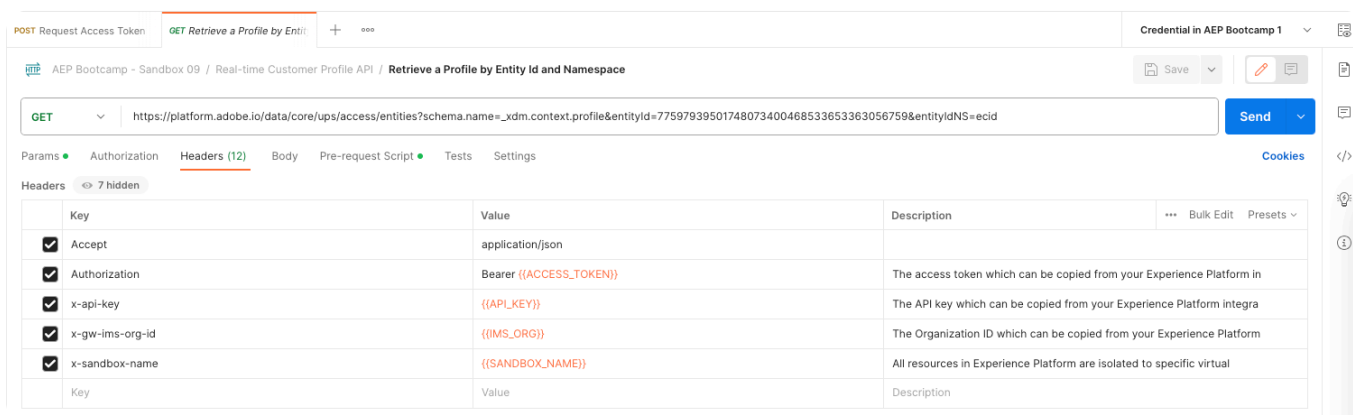
Key	Value	Definition
entityId	id	the specific customer ID
entityIdNS	namespace	the specific namespace that is applicable to the ID
schema.name	_xdm.context.profile	the specific schema for which you want to receive information

If you want to ask Adobe Experience Platform's APIs to give you back all Profile information for your own ECID, you will need to configure the request as follows:

Key	Value
entityId	[your own Email]
entityIdNS	email
schema.name	_xdm.context.profile

You should also verify the header fields of your request.

- Click on **Headers** tab in Postman.



You should see the definition of Header fields, most of them originating from the configuration of your environment. To check this for example:

1. Click on the  icon next to your selected environment **DEMO POT EMEA - sb01** (top right).
2. Scroll to the bottom of the list.
3. You will see **SANDBOX_NAME** defined as `sandbox01`.

Ok, now we are finally going to send the request. To do this:

1. Select the **Params** tab.
2. Ensure you specify `email` as the **VALUE** for **KEY** `entityIdNS` .
3. Paste the copied email address from above in the **VALUE** field for **KEY** `entityId` . E.g. `sacker+31042023@adobetest.com` .
4. Right click in the **VALUE** field with the email address and select **EncodeURIComponent** from the context menu. This will encode the email address when sending the request eg. `sacker%2B31042023%40adobetest.com` .
5. Click on **Send**.

You should get an immediate response from AEP, showing you something like:

The screenshot displays the AEP Bootcamp interface with a REST client request and its response. The request is a GET call to the endpoint `https://platform.adobe.io/data/core/ups/access/entities?schema.name=_xdm.context.profile&entityId=77597939501748073400468533653363056759&entityIdNS=ecid`. The response is a JSON object containing profile information.

Key	Value	Description
☒ Accept	application/json	
☒ Authorization	Bearer <code>{{ACCESS_TOKEN}}</code>	The access token which can be copied from your Experience Platform in
☒ x-api-key	<code>{{API_KEY}}</code>	The API key which can be copied from your Experience Platform integra
☒ x-gw-ims-org-id	<code>{{IMS_ORG}}</code>	The Organization ID which can be copied from your Experience Platform
☒ x-sandbox-name	<code>{{SANDBOX_NAME}}</code>	All resources in Experience Platform are isolated to specific virtual

```
1  {
2    "A28sBWUKfF0wa3dgBRbgkIAG": {
3      "entityId": "A28sBWUKfF0wa3dgBRbgkIAG",
4      "mergePolicy": {
5        "id": "fe9c9ce0-8e06-4c19-8a3c-232e342d5d7d"
6      },
7      "sources": [
8        "65043599575f6828d23dd061",
9        "profile-streaming-segment"
10     ],
11     "tags": [
12       "1a7de62f-4a04-4765-a4bb-16e50318f776:va7",
13       "aep_ups_partitioned_profile_cdc_low_lag_sla_0:13:3506554851"
14     ],
15     "identityGraph": [
16       "A28sBWUKfF0wa3dgBRbgkIAG"
17     ],
18     "entity": {
19       "userActivityRegions": {
```

This is the full response from AEP



```
{
  "BUF412p4HpYv1c3orLP1tfoGnaG3rXrLf13KJg": {
    "entityId": "BUF412p4HpYv1c3orLP1tfoGnaG3rXrLf13KJg",
    "mergePolicy": {
      "id": "b5e433f6-1acf-498a-ae49-41db36df28ce"
    },
    "sources": [
      "6968cf5b8546449baf8be28e",
      "segments"
    ],
    "tags": [
      "batchId-01KH1D7KGEJ7KFHVSWA6HCYZN",
      "bba685ea-3b2f-42ae-935a-fb9a602290e3"
    ],
    "identityGraph": [
      "BUF412p4HpYv1c3orLP1tfoGnaG3rXrLf13KJg",
      "GqiDwEFoxwkTPQNheCtQ"
    ],
    "entity": {
      "_demopotemea": {
        "scoring": {
          "marketingScore": 82
        },
        "individualCharacteristics": {
          "interests": {
            "medicalSpeciality": "ophthalmology"
          }
        },
        "identification": {
          "core": {
            "crmId": "CRM9A2F4K1",
            "email": "angeli+zeiss-1@adobetest.com"
          }
        }
      },
      "personalEmail": {
        "address": "angeli+zeiss-1@adobetest.com"
      },
      "testProfile": true,
      "consents": {
        "collect": {
          "val": "y"
        },
        "marketing": {
          "preferred": "email",
```

```

        "push": {
            "val": "y"
        },
        "email": {
            "val": "y"
        }
    },
    "segmentMembership": {
        "ups": {
            "b9b3d88d-fafa-42f8-9103-904e02afd56e": {
                "status": "exited",
                "lastQualificationTime": "2026-02-10T18:54:31Z"
            }
        }
    },
    "person": {
        "name": {
            "lastName": "Miller",
            "fullName": "John Miller",
            "firstName": "John"
        }
    },
    "identityMap": {
        "crmid": [
            {
                "id": "CRM9A2F4K1"
            }
        ],
        "email": [
            {
                "id": "angeli+zeiss-1@adobetest.com"
            }
        ]
    },
    "lastModifiedAt": "2026-02-10T19:09:14Z"
}

```

Experience Event Request

After having queried Platform's APIs successfully for profile data, let's now do the same with experience event data.

For such a request, there are four required parameters:

Key	Value	Description
schema.name	_xdm.comtext.experienceevent	The specific schema for which you want to receive information. In this case, we're looking for data that is mapped against the ExperienceEvent schema
relatedSchema.name	_xdm.comtext.profile	While we're looking for data that is mapped against the ExperienceEvent schema, we need to specify an identity for which we want to receive that data. The schema that has access to identity is the Profile-schema, so the relatedSchema here is the Profile-schema.
relatedEntityId	id	The specific customer ID
relatedEntityIdNS	namespace	The specific namespace that is applicable to the ID

1. In Postman, select the **GET Retrieve a Profile & EEvents by Entity Id and Namespace**.
2. In **Params** tab, copy the email address you used earlier as **VALUE** for **KEY** `relatedEntityId` .
3. Ensure the value is encoded:
 1. select the **VALUE** field for `relatedEntityId` ;
 2. click on the three-dots icon that appear;
 3. select **EncodeURIComponent**.
4. Click on **Send**.

You should get an immediate response from AEP. Details are shown in the **Body** section. In that response you will find your experience events:

POST Request Access TokenGET Retrieve a Profile by EntityGET Retrieve a Profile & EEvents

Credential in AEP Bootcamp 1

AEP Bootcamp - Sandbox 09 / Real-time Customer Profile API / Retrieve a Profile & EEvents by Entity Id and Namespace

GEThttps://platform.adobe.io/data/core/ups/access/entities?schema.name=_xdm.context.experienceevent&relatedSchema.name=_xdm.context.profile&relatedEntityId=7759793950174807340046853365336305t...

Send

ParamsAuthorizationHeaders (12)BodyPre-request ScriptTestsSettings

Headers7 hidden

Key	Value	Description
Accept	application/json	
Authorization	Bearer {{ACCESS_TOKEN}}	The access token which can be copied from your Experience Platform in
x-api-key	{{API_KEY}}	The API key which can be copied from your Experience Platform integra
x-organization-id	7759793950174807340046853365336305t...	The Organization ID which can be copied from your Experience Platform

BodyCookiesHeaders (12)Test Results

Status: 200 OKTime: 1105 msSize: 9.67 KBSave as Example

PrettyRawPreviewVisualizeJSON

```
1  {
2    "_page": {
3      "orderby": "timestamp",
4      "start": "50612d84-2a08-4a1d-89a0-402eefb067d4-0",
5      "count": 6,
6      "next": ""
7    },
8    "children": [
9      {
10       "relatedEntityId": "A28sBMUKfF0wa3dg8RbgkIAG",
11       "entityId": "50612d84-2a08-4a1d-89a0-402eefb067d4-0",
12       "sourceId": "6504359a8b64cc28d3890b38",
13       "timestamp": 1695109414010,
14       "entity": {
15         "environment": {
16           "ipV4": "62.45.103.6",
17           "type": "browser",
18           "browserDetails": {
19             "userAgentClientHints": {
20               "mobile": false,
21               "platform": "macOS",
22               "brands": [
23                 {
24                   "brand": "Chromium"
```

You have now successfully looked up a customer profile using the Adobe Experience Platform API's.

3.4. [Bonus] Exploring the Segmentation Service API

In this exercise, you'll use Postman and Adobe I/O to create an audience, by making use of Adobe Experience Platform's APIs.

At the moment, in the scope of Real Time Customer Profile, the terms `segment` and `audience` are interchangeable. Audience is the new name of what Adobe used call segment. The Product Management is working to update all the materials with the new term, but some elements in docs and APIs still have use "segment".

Create an audience

Creating an audience using the AEP API's require a number of steps in Postman. But first...

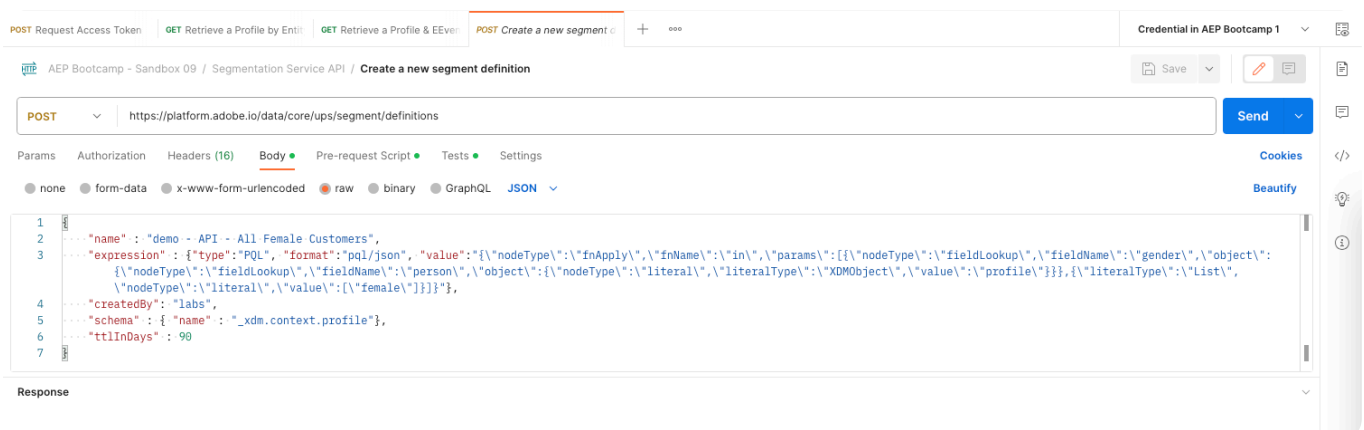
1. Locate the **AEP Bootcamp** collection.
2. Open the **Segmentation Service API** folder.

Create a segment definition

We will first create a segment definition.

- Select **POST Create a new segment definition**.
- Click on the **Body** tab to see the body of the request.

You see the segment expression defined in the Profile Query Language, PQL. You can find more [information and documentation](#) about PQL.



- Update the `name` value within the **Body** request. E.g. replace `demo` with your user identification.
- The body should look like:

JSON



```
{
  "name" : "sacker - API - All Female Customers",
  "expression" : {"type":"PQL", "format":"pql/json", "value":"{\"nodeType\":\"fnApply\""},
  "createdBy": "labs",
  "schema" : { "name" : "_xdm.context.profile"},
  "ttlInDays" : 90
}
```

You should also verify the Headers of your request.

- Select **Headers** tab.
- You will see same set of header key/value pairs as in the earlier Postman example requests.
- No action required.

To create the segment:

1. Click on **Send**.
2. View the results in the **Body** section at the bottom.

You can now also view your segment definition in the UI.

1. Login to Adobe Experience Platform.
2. Go to **Audiences**.
3. Select **Browse** tab.

You should see your created segment in the list of Audiences.

You have now successfully created a segment using the Adobe Experience Platform APIs.

4. Lab 2: Nurturing & Lead Management

In the Adobe Journey Optimizer module we will be creating a customer journey starting with an audience of profiles.

Learning objectives

- Learn how to use audiences for marketing
- Learn about setting up offers
- Learn how to design email & push messages
- Learn how to create a custom journey

Adobe Journey Optimizer

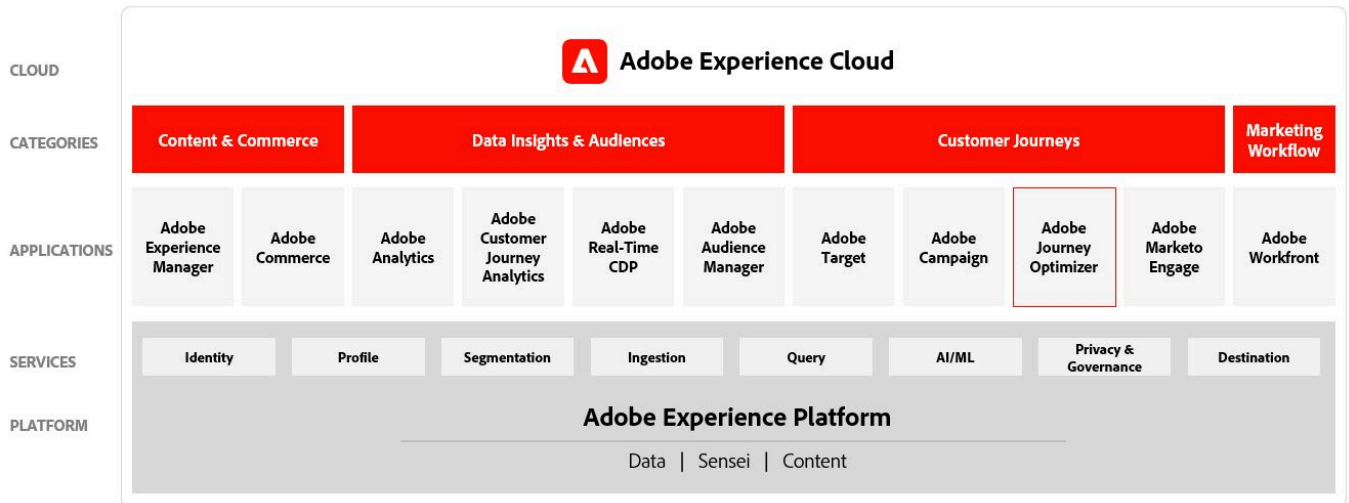
For customer centric brands, Adobe Journey Optimizer is an agile and scalable application built natively on the Adobe Experience Platform for orchestrating and delivering personalized, connected customer journeys across any app, device, screen, or channel.

Journey Optimizer allows organizations to create, orchestrate and deliver both scheduled marketing programs and outreach (such as weekly promotions for a retail store) and tailored individual communications (like a push notification for an item that a loyalty app customer may have looked at that was previously out of stock) within the same application.

Adobe Journey Optimizer provides brands the flexibility to engage with customers across a broad range of use cases:

- With 1:1, real-time messages that are initiated based on the customer's behavior, engagement, and interactions. For example, a customer enters a store location and receives a push message for a current in-store offer on a recently restocked product based on the customer's past purchase.
- Optimize journeys and deliver triggered messages based on business-related events. For example, any offer or message contextually relevant to the customer's journey, such as a weather-related travel impact or delayed shipping notification.
- Orchestrate, optimize, and deliver audience-based email and mobile push campaigns. For example, email newsletters or daily offers update via mobile app push message.

- Orchestrate and optimize audience-based programs or 1:1 journeys for delivery through external mar-tech and customer experience applications. For example, to deliver notifications, messages and offers through channels like SMS, direct mail, or kiosks.
- Support for broad-based, high throughput burst messaging. For example, breaking news alerts or live event updates.



4.1. Orchestrating customer communications

In this exercise, you will explore how you can use Adobe Journey Optimizer to orchestrate relevant and timely customer communications based on both customer maturity and demonstrated interests.

You will work with known customer profiles and simulate a real-life marketing scenario in which communications are triggered when a customer reaches a specific stage in their journey. The goal is not only to decide *when* to communicate, but also *how* and *what* to communicate, using personalization and decisioning capabilities.

This use case focuses on combining audience-based orchestration, dynamic content, and offer decisioning within a single journey, while keeping the experience realistic and business-oriented.

Business Scenario

ZEISS wants to engage customers who have reached a certain level of marketing maturity by inviting them to explore valuable educational content. At the same time, ZEISS aims to tailor the communication to each customer's medical specialty and product interests.

When a customer reaches the appropriate journey stage, ZEISS sends a personalized email inviting them to explore the Peer Insights section of the ZEISS website. The email content adapts to the customer's medical specialty, while a contextual webinar invitation is selected dynamically based on the product the customer has shown interest in.

After the communication is sent, ZEISS updates the customer record in its CRM system to keep track of the interaction.

Objectives

- Create a **read-audience journey** in Adobe Journey Optimizer
- Orchestrate communications based on a **scoring attribute**
- Configure a personalized email using a **predefined template**

- Apply **dynamic content** based on customer profile attributes
- Use **Offer Decisioning** to personalize offers based on customer behavior
- Trigger a **Custom Action** to simulate an update to an external CRM system

This exercise demonstrates how Adobe Journey Optimizer acts as the central orchestration layer, enabling scalable and relevant customer communications.

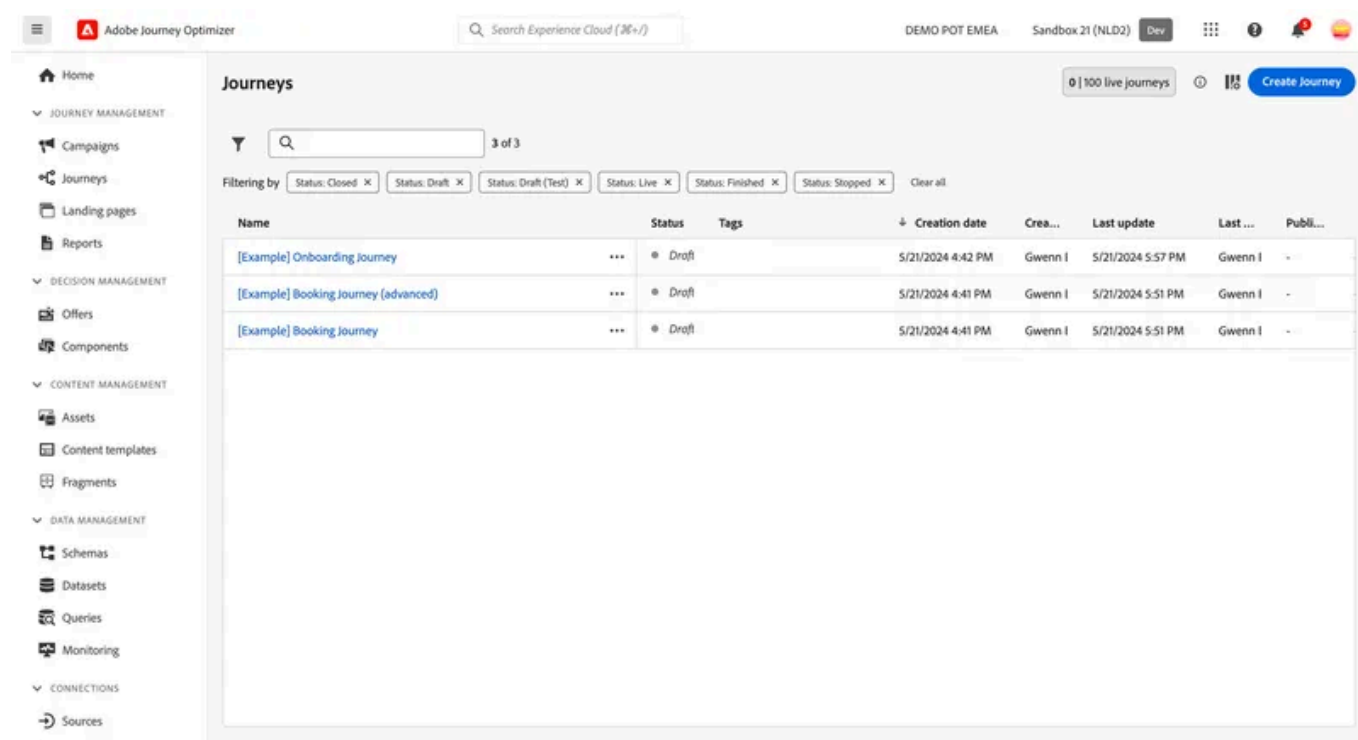
4.1.1. Creating the journey

In this exercise, you'll be creating and testing a journey.

Journey overview

To get an overview of all journeys in Adobe Journey Optimizer:

1. To open the Adobe Journey Optimizer UI click on the nine-dots icon in the top right corner and select Journey Optimizer.
2. In the menu on the left side, under **Journey Management**, click on **Journeys**. You will see a overview with all existing journeys.

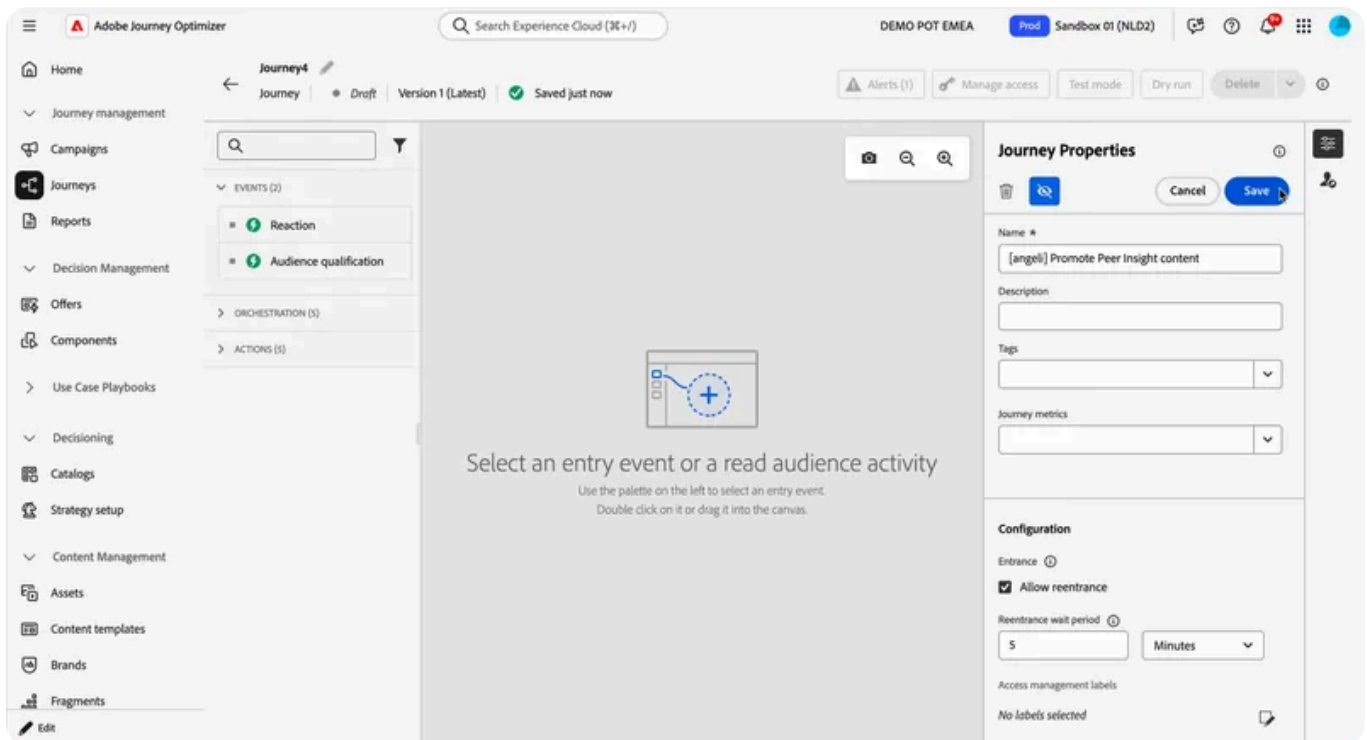


Creating a journey

We'll be creating a journey that will send a one-shot email to customers in the *Consideration* stage, to promote the peer insight content. Then the journey will update the customer record in Salesforce with the information about the email sent.

Click on **Create Journey**. You'll be taken to the **journey canvas** with the journey properties opened.

1. Set the **name** to [your name] Promote Peer Insight content .
2. For the other properties we'll keep the default values.
3. Your screen should look like the image below. Click **Save** to save and close the properties.



You're now in the journey canvas. This is where you'll be creating your journey's logic. In the left menu you have **activities**. There's three types of activities:

Events are the triggers that can start or continue your journey.

Orchestration is the logic of your journey. It looks at conditions, audiences, but can also be used to make your workflow wait or end.

Actions are the results of your journey. This can be messages, profiles updates or API calls.

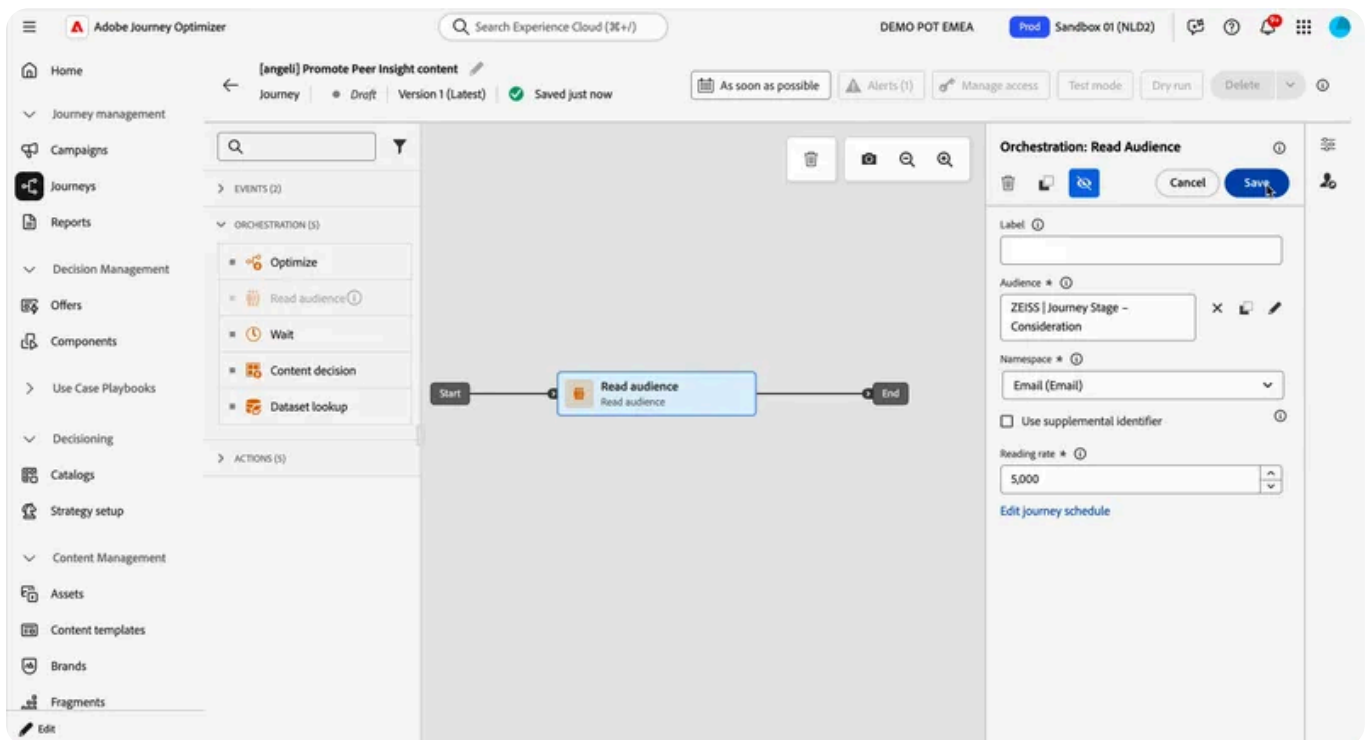
Read audience

1. We're starting our workflow by reading all the profiles qualified for an audience. From the **Orchestration** tab, choose **Read audience** and drag it onto the canvas.
2. Click on the text box **Audience**, a window will appear.
3. Select the audience **ZEISS | Journey Stage - Consideration**.
4. From the Namespace dropdown, select **Email**.

5. Click **Save**.

When you configure a **Read Audience** journey, you must select both an **Audience** and an **Identity namespace** because they serve two different purposes. The **Audience** defines *who* is eligible to enter the journey (the list of profiles based on segment membership). The **Identity namespace** defines *which identity* will be used to execute and track the journey (for example, Email, ECID, or CRM ID). Only profiles that have a value in the selected namespace can actually enter the journey. That identity will then be used consistently for messaging, reporting, and capping throughout the entire journey.

As the journey commences, the engine will read all profiles within the selected audience and subsequently push each one to the next node.



Email - Peer insight

In the next steps you will be building the email for your journey.

1. From the actions tab, choose **Actions** and drag it above the line before the end node, where a circle with "+" inside will appear.
2. Select **Email** and then click **Add**.
3. Click on the activity to open the detailed view.
 1. Set the **label** to `Email - Peer insight`.

2. Click on **Configure action**.

3. From the **Email configuration** dropdown, select `config-email-marketing`.

4. Click on **Edit content** to start designing your email.

1. Click on  to create a subject line. Set it to `FIRSTNAME,` `deepen your`
`expertise with ZEISS Peer Insights.`

2. Remove the text `FIRSTNAME` and search for `first name` in the profile attributes.

3. Find the field First name (... *attributes* > *person* > *Full name*) and click on the **+ icon** to add it to your subject line. It should now be

`{{profile.person.name.firstName}},` `deepen your expertise with`
`ZEISS Peer Insights.`

4. Click **Save**.

5. Click on **Edit email body**.

6. Under **Saved templates**, choose `ZEISS | Template - Text and Image`. It will show you a preview of the template.

7. Click on **Use this template**.

4. The email designer will now open. It should look like this:

IMAGE

In the left menu you have **Components**.

Structure components are the building blocks of your email, they will determine the layout of your email.

Content components are the different forms of content that you can place inside your structure components, like text, buttons and images.

1. Click the **Subject Header** component and change the text to:

1. `Expert insights for informed clinical decisions`

2. Let's put in a header image. Click on **Browse** in the header component of the email template. This will open the **Assets Essentials** interface. Navigate to **Hand-on labs > Zeiss** and select the image `email-default.jpg` and click **Select** in the top right.

3. Click the **Body component** and remove the text `FIRST NAME` and click on the  **icon** to add personalization to your email.
4. In the **Profile attributes** section find the field First name (... *attributes* > *person* > *Full name*) and click on the **+ icon** to add it to your text.

Click **Save**. Your component should look like this:

Hello `{{profile.person.name.firstName}}`,

The template contains a generic text that must be replaced with the appropriate content:

- Click on the *Lorem ipsum...* text box, select the content and replace with this text:

Text



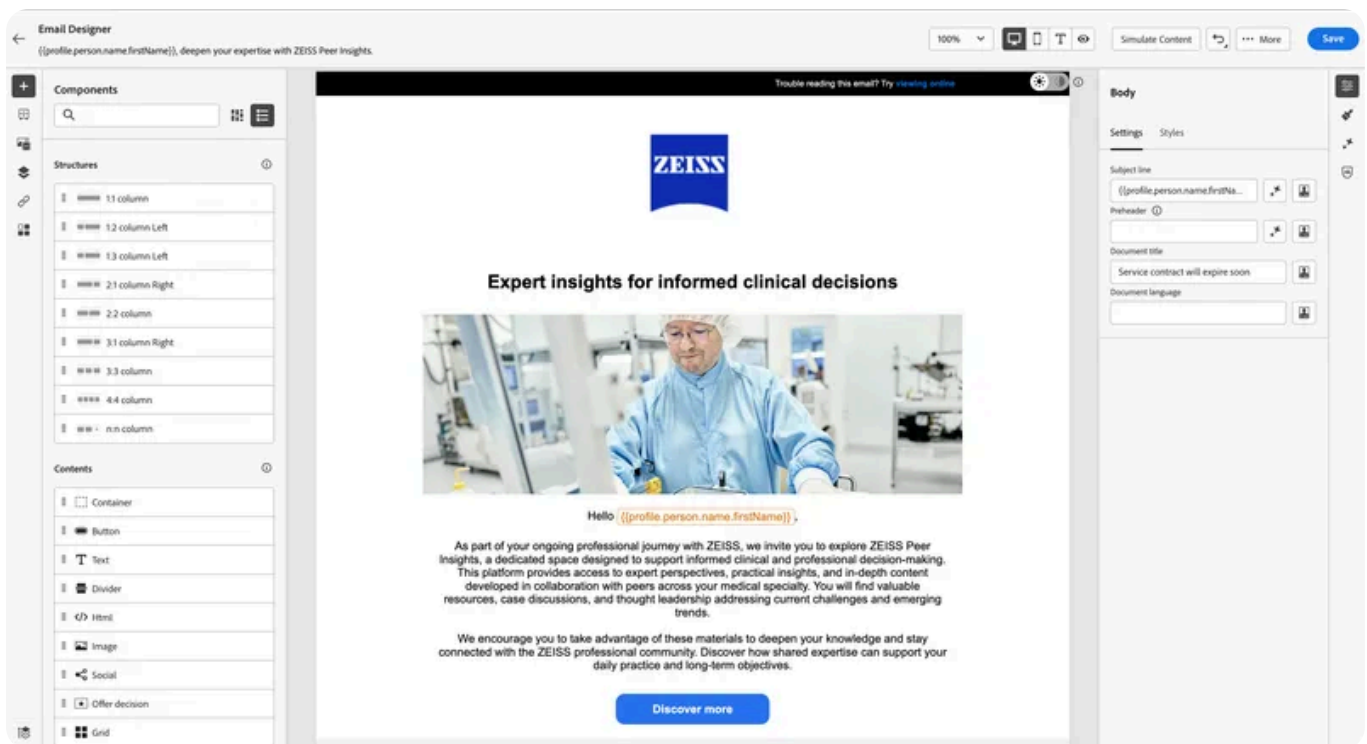
As part of your ongoing professional journey with ZEISS, we invite you to explore ZEISS I
This platform provides access to expert perspectives, practical insights, and in-depth co

We encourage you to take advantage of these materials to deepen your knowledge and stay c

Now we are going to customise the CTA:

- click the **Button** component, the menu on the right will show the settings.
- Change the label to `Discover more`.
- Change the link to `https://www.zeiss.com/meditec/en/myzeiss/peer-insights.html`

To protect the work you've done so far, click **Save** on the top right corner.



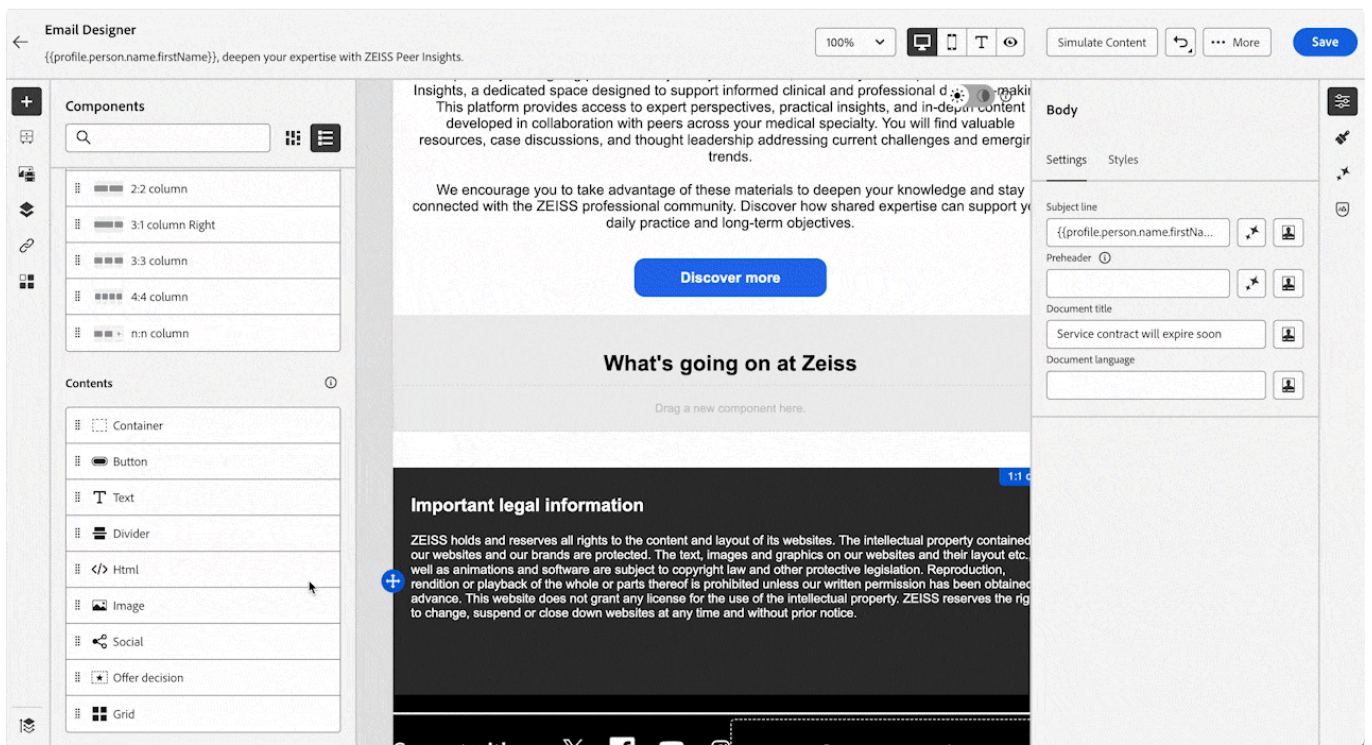
Add offer

The template includes an empty section that can be customized according to the communication requirements. In this email we want to promote an upcoming webinar, based on the customer behaviour.

The offers have already been created and configured to be displayed only under certain conditions. We only need to include and setup the **Offer decision** component.

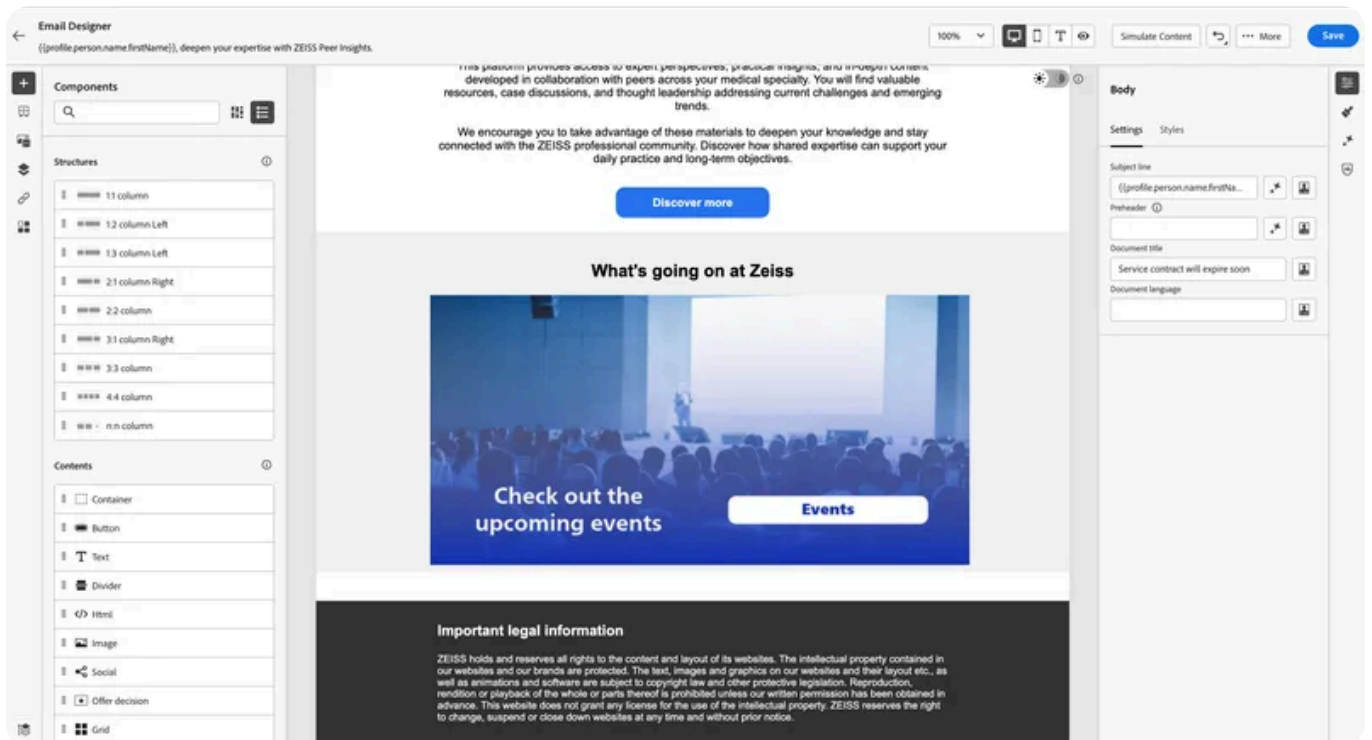
In body of the email:

- Click on the text **Section header** and replace with `What's going on at Zeiss`.
- From the **Contents** section in the left menu, drag and drop **Offer decisions** component in the section where is written `Drag a new component here`.
- Click on **Add**.
- Click on **Select Offer Decision**, on the Placements drop down select **email-image**.
- From the list select `[Example] webinars` and then click **Add**.



Decisions are containers for your offers that will leverage the Offer Decision Engine in order to pick the best offer to deliver, depending on the target of the delivery. In the box you'll see the preview of the 3 offer available, plus the Fallback, displayed in case the customer is not eligible for any other offer.

To protect the work you've done so far, click **Save** on the top right corner.

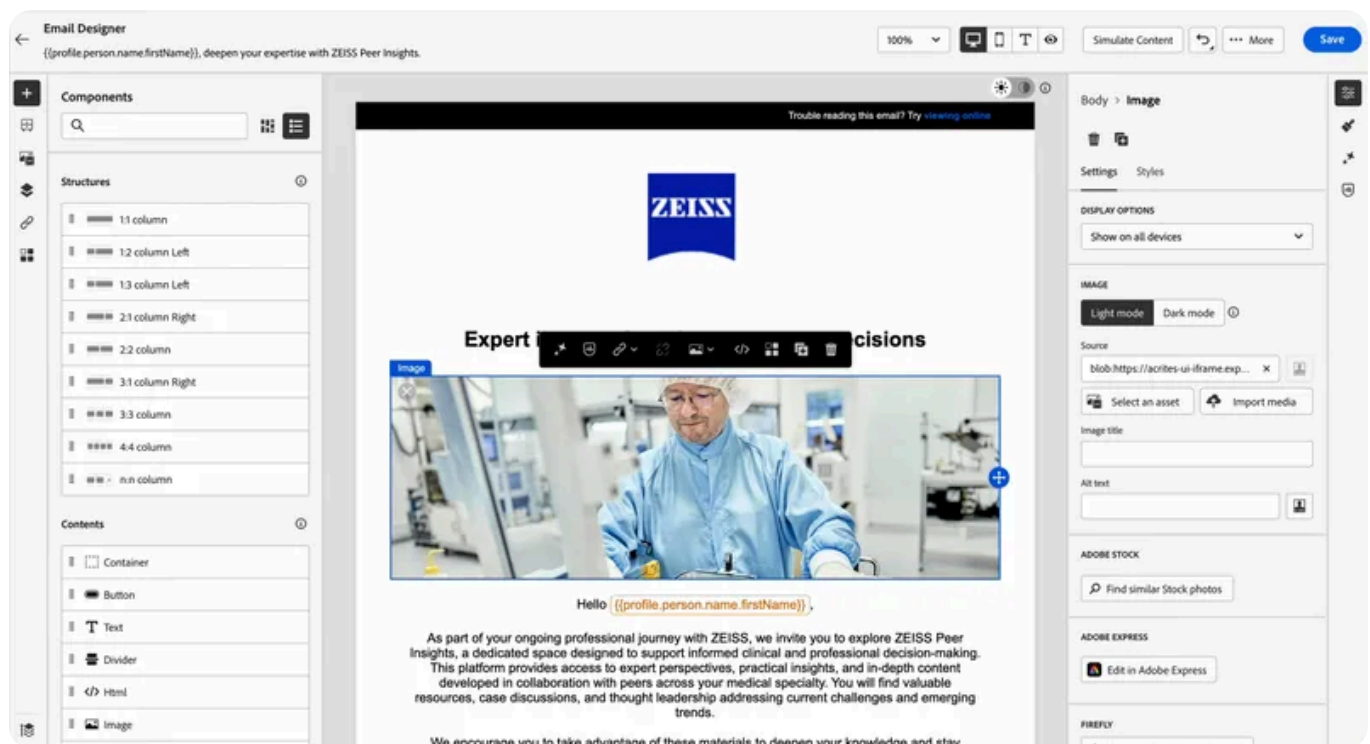


Add conditional content

In this exercise, you will configure conditional content within the email to adapt specific elements based on customer profile attributes. Conditional content allows marketers to tailor the communication experience without creating multiple versions of the same message, ensuring relevance and consistency across different medical specialties.

Let's personalise the hero in the email:

- select the image by clicking on the hero image at the top of the body. A blue border will appear around the image.



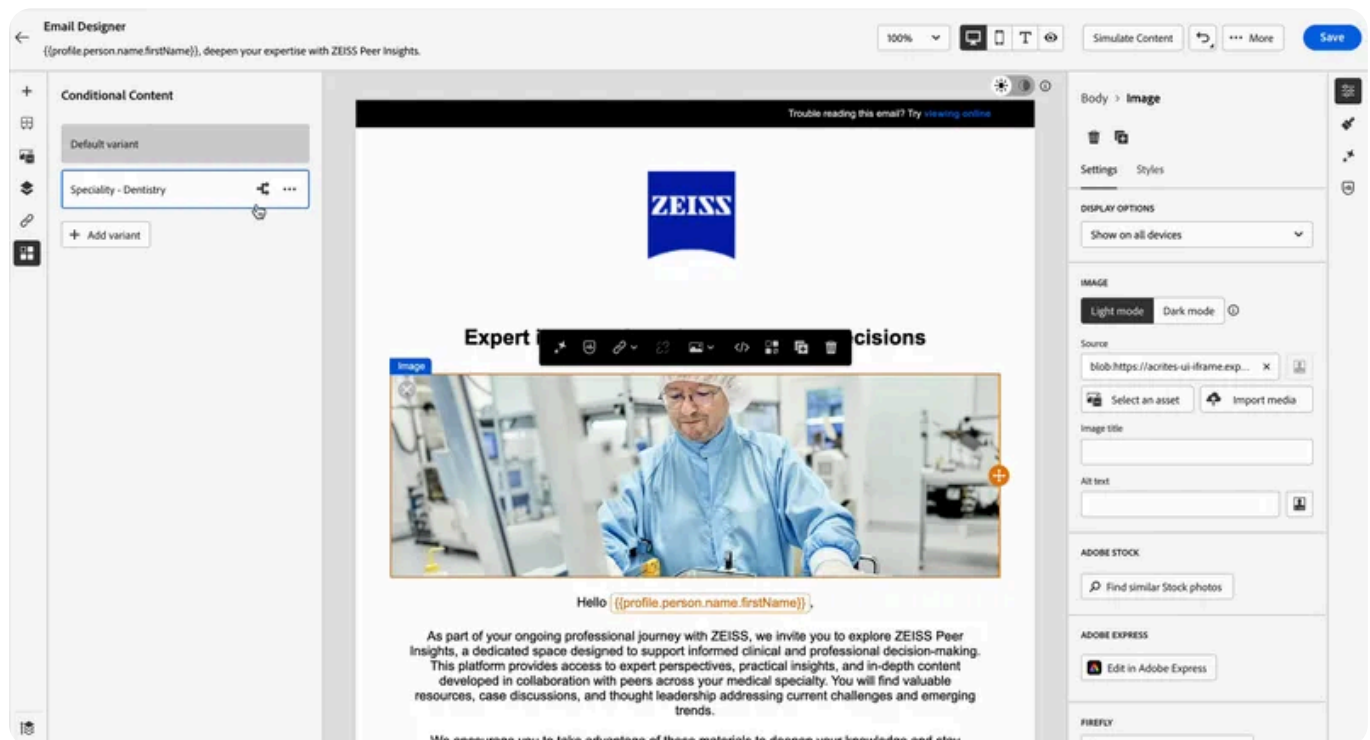
- In the pop-up menu, click on the **⌵-icon** to enable **Conditional content**. The left menu will change to the **Conditional Content** settings and display your content variants.
- We're not changing the default variant as we want this to display as the current content.
- Select **Variant - 1** and hover over it with your cursor. Click on the **⋮-icon** and choose **Rename**. Set the name of this variant to `Speciality - Dentistry`.
- Hover over the variant again and click on the **condition-icon**. A window will open. Select the `Speciality - Dentistry` condition and click **Select**.

Condition

You can create your own rules and save preset rules here to be used in future conditional content conditions. In our example we prepared a condition that is based on a profile attribute.

- Select your variant **Speciality - Dentistry**. It'll have a blue border. Then go into the content settings on the right panel and change the picture:
 - Click on **Select an asset**; this will open the **Assets Essentials** interface.
 - Navigate to **Hand-on labs > Zeiss** and select the image `email_dentistry.jpg`.
 - Click **Select** in the top right.

Your content block should now look like this:



You can now swap between both content variant and see the difference.

You can create more variants by clicking on **+ Add variant** and repeating the previous actions.

To protect the work you've done so far, click **Save** on the top right corner.

To come back to the journey canvas:

- click the back arrow on the top left corner near Email Designer.
- If prompted, click **Save & Close**.
- Click the arrow on the left, near the journey title.
- Click **Save**.

Your email is now ready. Let's move to the next step.

Update profile in Salesforce

In this exercise, you will configure a custom action to simulate an update to Salesforce after a customer communication has been sent. This step illustrates how journey orchestration can extend beyond messaging, ensuring that customer interactions are consistently reflected across connected enterprise systems.

In this lab, you will not see real integration with the Salesforce CRM system; instead, you will see a simulation via webhook.

From the **Actions**, drag the item **SFprofileUpdate** and drop on the line after the email node. On the right you'll see the settings panel: change the label to: `Update profile in Salesforce`.

As next step you need to configure the parameters required for the API call. Some of them will be hard coded, as they are related to this journey only; others will be taken from the customer profile, as they change for each customer.

In Request parameters, click on the text box with the label `email`:

- in the window that appears browse the attributes under **Experience Platform**, along this path: **ProfileFieldGroup > profile > _demopotemea > identification > core > email**.
- Click the check box related to this field.
- Click **Ok**.

In the text box now you should see `The email of core`.

Click on the text box with the label `crmId`:

- in the window that appears browse the attributes under **Experience Platform**, along this path: **ProfileFieldGroup > profile > _demopotemea > identification > core > crmId**.
- Click the check box related to this field.
- Click **Ok**.

In the text box now you should see `The crmId of core` .

Click on the text box with the label `last_comm` :

- in the window that appears click on **Advance Mode**.
- Type `"Peer Insights invitation email"` .
- Click **Ok**.

This is a fixed string, not a customer related info, that's why we used the Advanced Mode and added the string manually.

Click on the text box with the label `last_comm_dateTime` :

- in the window that appears click on **Advance Mode**.
- Browse through the **Functions** list and click on **Function > Date > now > now(): dateTime**. This is the timestamp when the action is executed.
- Click **Ok**.

Instead of a fixed string, for this field we used a function.

Click on the text box with the label `journey` :

- in the window that appears browse the attributes under Experience Platform, along this path: **Journey properties > Journey version > journeyVersionName**.
- Click the check box related to this field.
- Click **Ok**.

In this case we used a contextual information about the journey, not the profile.

Click on the text box with the label `channel` :

- in the window that appears click on **Advance Mode**.

- Type "email" .
- Click **Ok**.

Click **Save**.

You have now completed the configuration of an end-to-end journey. This journey demonstrates how customer maturity, profile attributes, and behavioral signals can be combined to orchestrate relevant, personalized communications. By bringing together audiences, messaging, decisioning, and external actions, you can ensure consistent and meaningful engagement across the entire customer journey.

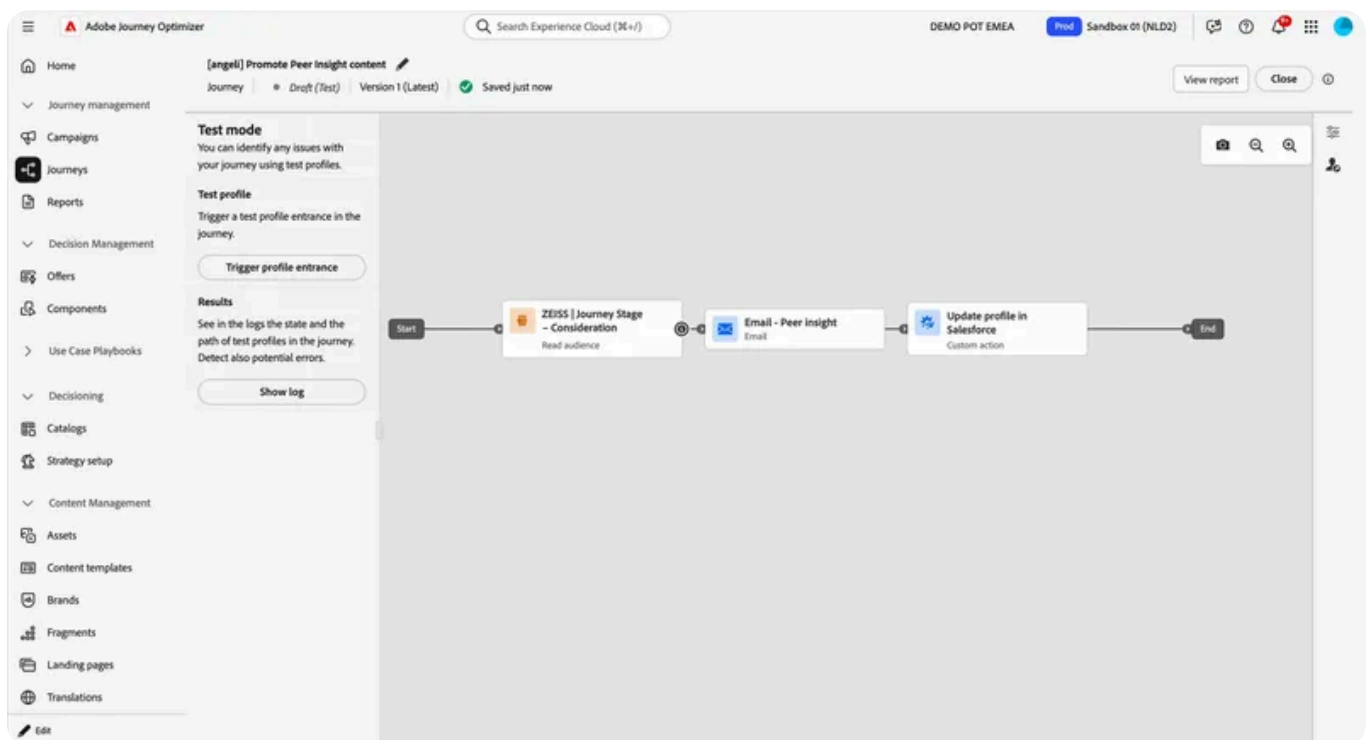
4.1.2. Testing the journey

In this exercise we'll test the journey we've built.

In Adobe Journey Optimizer you can run journeys in test mode to test if the outcome of your journeys aligns with your requirements.

To enable test mode, click on **Test mode** on the top right of your journey.

While in test mode, you can not make changes to the journey. You'll also notice that the left menu is replaced with the Test mode panel.

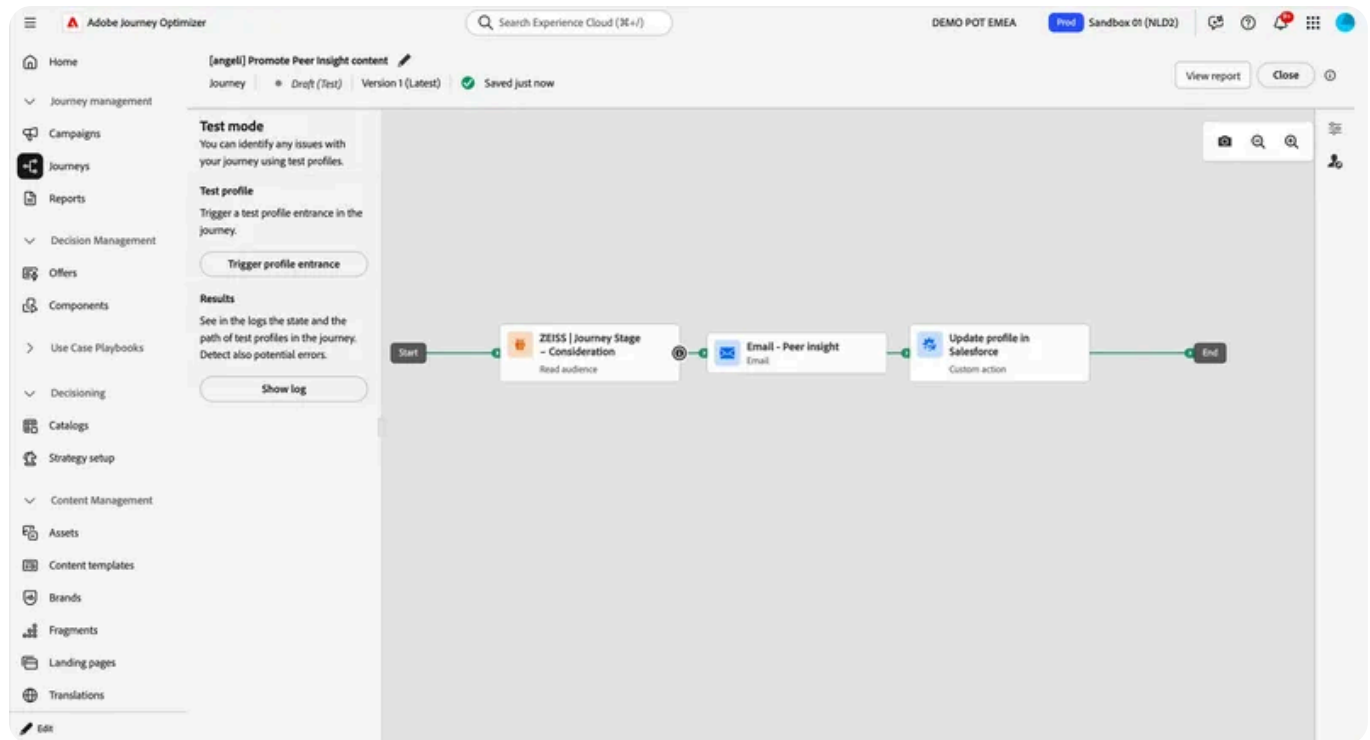


1. Click on **Trigger profile entrance**.
2. Fill out the required field:
 - Set **Profile Identifier** to your ZEISS email address.
3. Click **Send** to start the test.

The window will close and the test will now start. In a few moments you'll see more arrows turn green. This is your test profile moving through the journey. You will receive the email(s) within the next couple of minutes.

To see the mocked API call to Salesforce, you can visit the [webhook dashboard](#).

Your screen should look like this:



You've now tested your journey.

1. Turn off test mode by clicking **Close** in the top right corner.
2. Click the **<** in the top left to navigate back to the **Journeys overview**.

5. Lab 3: Service Contract Renewal

Focus area

Adobe Journey Optimizer

Features

Orchestrated Campaign

Ad Hoc Targeting

Data driven email activation

Multiple messages per profile

Difficulty

Easy

Use case description

As a Marketer, I want to inform customers about their expiring service contracts and provide an option to contact us for renewal: automated notifications will be sent 30 days before expiration, followed by a reminder 10 days before expiration, and a final call on the contract end date.

Resources

Relational data model

Data engineers have designed a relational data model and populated it with sample data.

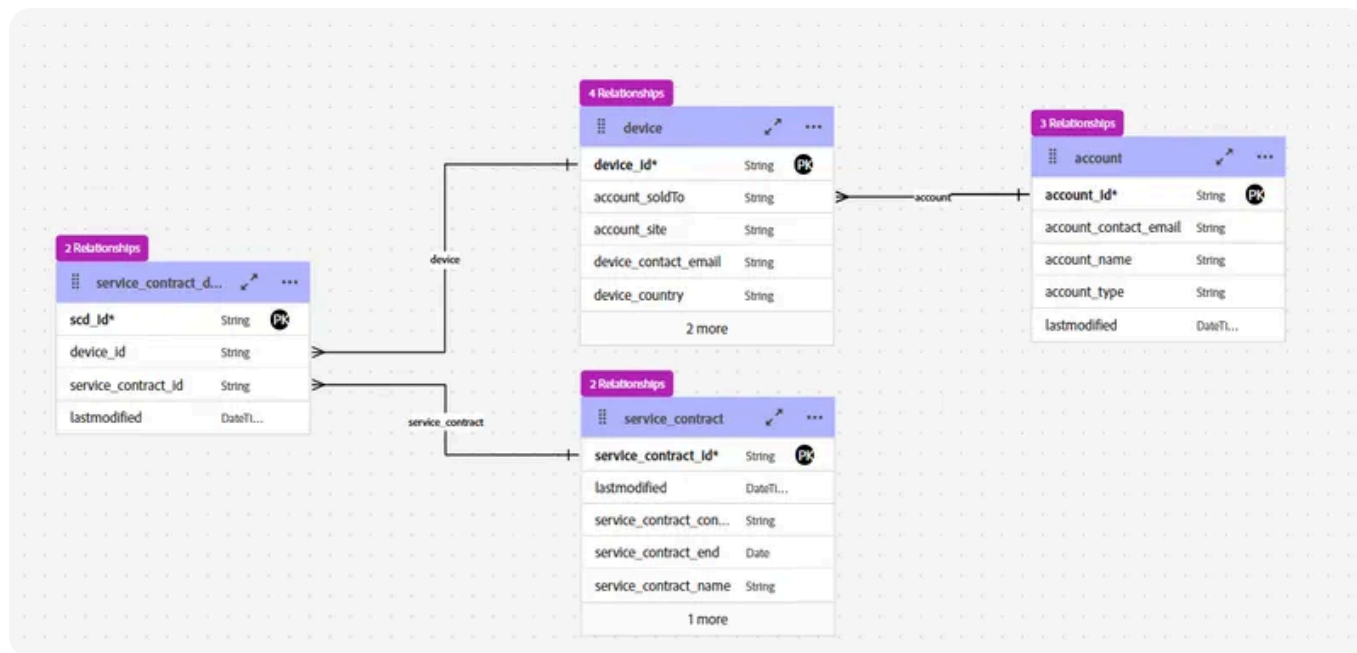
There are 3 main entities: **Account**, **Device** and **Service Contract**

Each entity has been described with a **Relational** schema.

The relationships between entities have been defined with these cardinalities:

- 1 account is linked to 0..N device(s)
- 1 device is linked to a 0..N service_contract
- 1 service_contract is linked to 0..N device

The Entity Relational Diagram is visible in [Data management > Schemas > Relationships](#)



Email template

A Web Agency has provided an email template named **[Example] Contract Expiration Alert Message** available in the Content template library in [Content Management > Content template > All template](#) folder.

Solution Design

Orchestrated Campaign is the solution that let you create easily an audience by manipulating **multiple entities** like contract and recipient. This process let you discover, manipulate, filter the data and calculate aggregate in an **iterative way** (start/resume/stop/restart the flow).

Orchestrated Campaign is the only solution that let you deliver one email per contract, that means that a profile with multiple expiring contracts will receive multiple emails.

The following steps will describe:

- how to create segments of expiring contracts
- how to deliver one email per contract
- how to transform a segment in an audience

This solution has been designed to illustrate **capabilities** of the product. The implementation details could change in real life conditions.

Step 1 - Ad Hoc Targeting

Goal

Filter the contracts

Create 3 segments:

- Contracts that will expire in 30 days
- Contracts that will expire in 10 days
- Contracts that will expire today

Highlight

Build audience, Distribution of values, Enrichment, Split

One way to do it is to follow these steps:

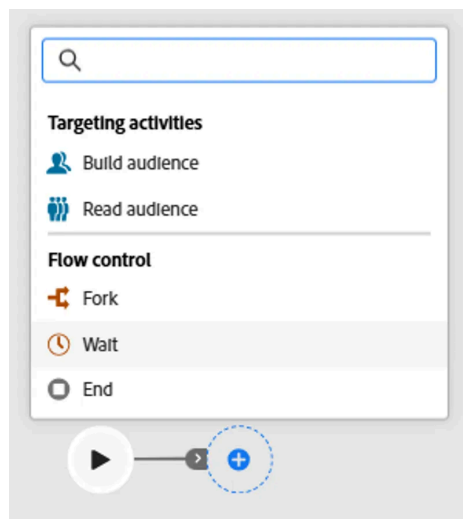
1. Create a new Orchestrated Campaign
2. Build an audience of contracts
3. Calculate the number of days before the expiration
4. Split the records in 3 segments

Create a new Orchestrated Campaign

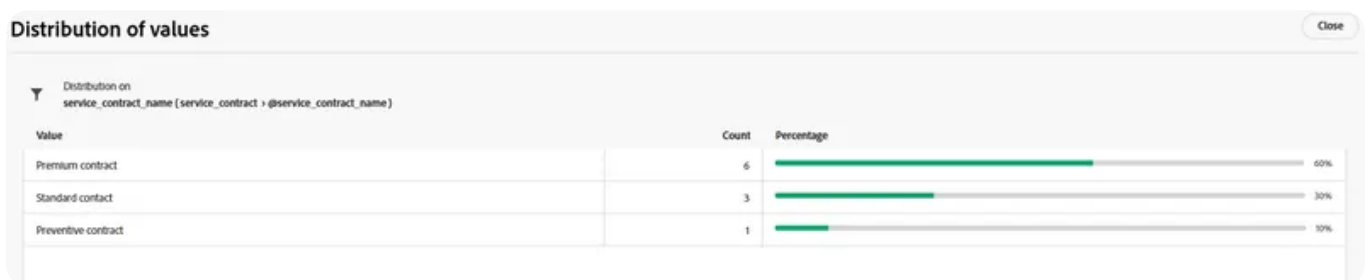
- In the menu on the left side, under **Campaigns**, click on **Orchestration**
- Click on the **Create campaign** button
- Select **Orchestration - Marketing** and click on **Confirm**
- Set the name to `[your name] Service Contract Renewal`
- Click on **Save**

Filter contracts

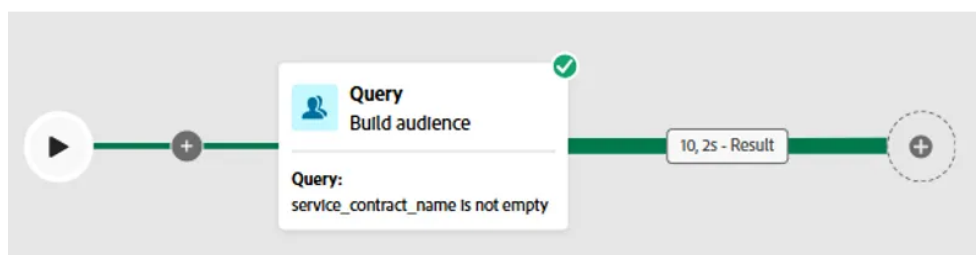
- Click on the + icon to display the list of activities



- Select the **Build audience** activity
- Set the Targeting dimension to **service_contract**
- Click on **Create audience** button
- Click on **Add condition**
- Select **service_contract_name**, click on the ... button and click on **Distribution of values**



- Close and just set the filter condition **to service_contract_name is not empty**
- Click on **Calculate** to get a count of records
- Click on **Confirm**
- Click on **Start** to start queries in a simulation mode



- Click on the **Result** box in the green transition link and click on **Preview results** button to see the results

Calculate the number of days before the expiration

- Click on the + icon to display the list of activities
- Select **Enrichment**
- Click on the + **Add enrichment** data button
- Click on **Edit expression** button
- Click on **Fx** (Helper functions) icon and set this expression

```
DaysDiff([target/@service_contract_end], GetDate())
```

- Click on **Confirm** button
- Click on **Resume** button to let the engine execute the Enrichment activity



- Click on the **Result** box in the green transition link and click on **Preview results** button to see the results

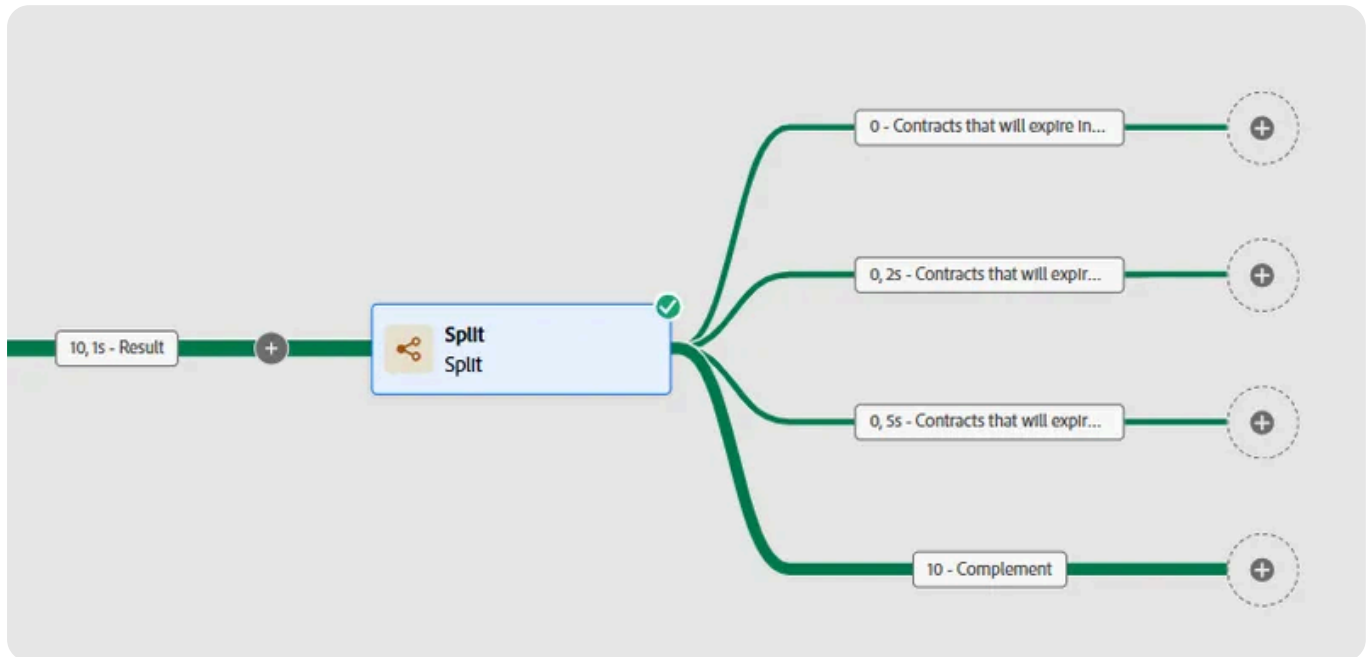
Preview results

Targeting dimension	service_contract_id	DaysDiff(service_contract_end, GetDate())
S-CT-001	S-CT-001	94
S-CT-002	S-CT-002	125
S-CT-003	S-CT-003	186
S-CT-004	S-CT-004	125
S-CT-005	S-CT-005	612
S-CT-006	S-CT-006	612
S-CT-900	S-CT-900	33
S-CT-901	S-CT-901	33
S-CT-910	S-CT-910	33
S-CT-911	S-CT-911	33

Split the records in 3 segments

- Click on the + icon to display the list of activities
- Select the **Split** activity
- Define 3 segments and filter with the calculated field

- Contracts that will expire in 30 days
- Contracts that will expire in 10 days
- Contracts that will expire today
- Enable the **Generate complement** option
- Click on **Resume** button
- Depending on the day, the results below will change



To illustrate **capabilities** of the product, different conditions have to be set up in order to get records in the segments.

- As an exercise, change the filters to get more records in the segments and enable the overlapping option; for instance:
 - 1st segment:

```
(DaysDiff(service_contract_end, GetDate()) equal to 30)
OR
(service_contract_id included in (S-CT-900, S-CT-901, S-CT-910, S-CT-911))
```

- 2nd segment:

```
(DaysDiff(service_contract_end, GetDate()) equal to 10)
OR
(service_contract_id included in (S-CT-001, S-CT-002, S-CT-900, S-CT-901))
```

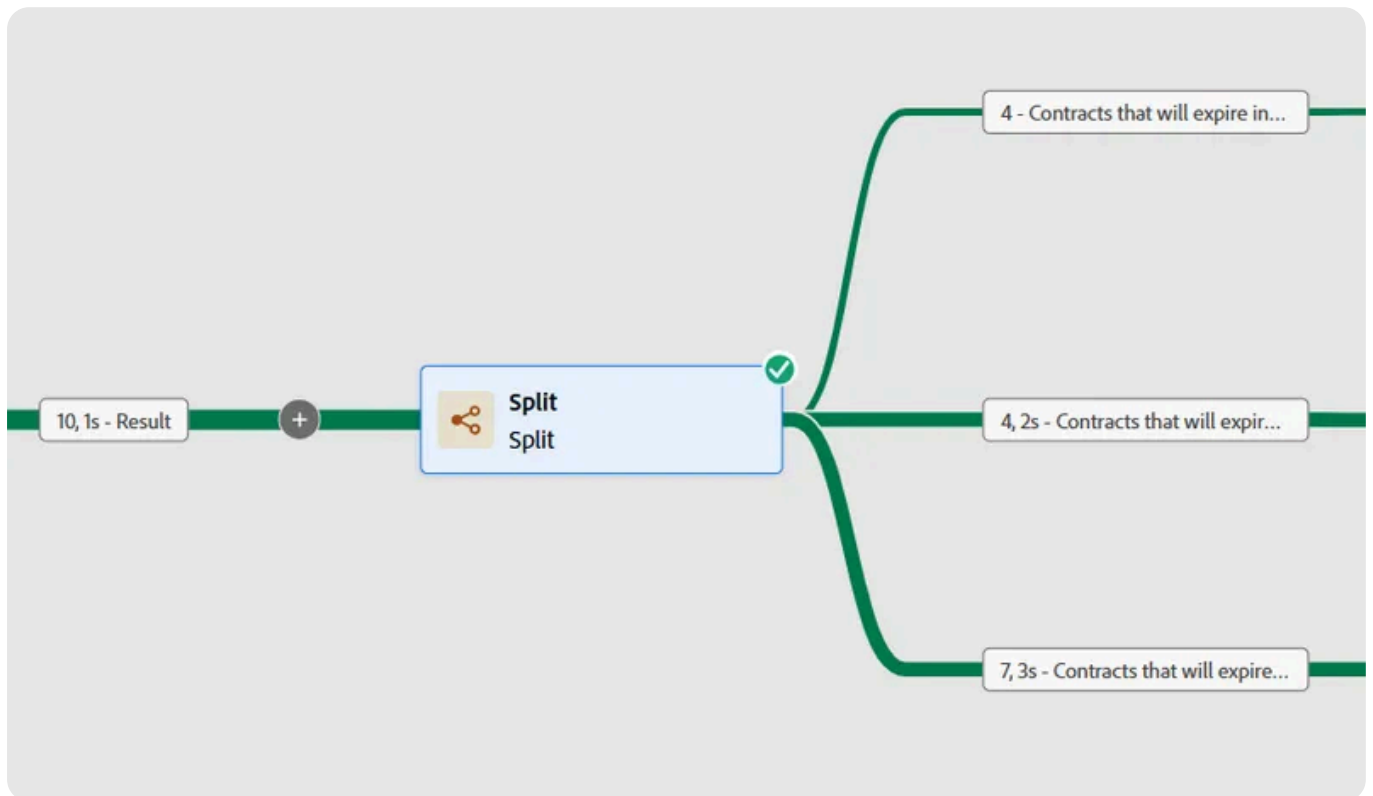
- 3rd segment:

```
(DaysDiff(service_contract_end, GetDate()) equal to 0)
```

OR

```
(service_contract_id included in (S-CT-001, S-CT-002, S-CT-003, S-CT-900, S-CT-901, S-CT-910, S-CT-911))
```

- Check the box **Enable overlapping of output populations**
- Click on **Resume** button to get these results



Step 2 - Send one email per contract

Goal

Send messages to recipients, not contracts

Send 1 email per contract - 1 recipient can receive multiple messages

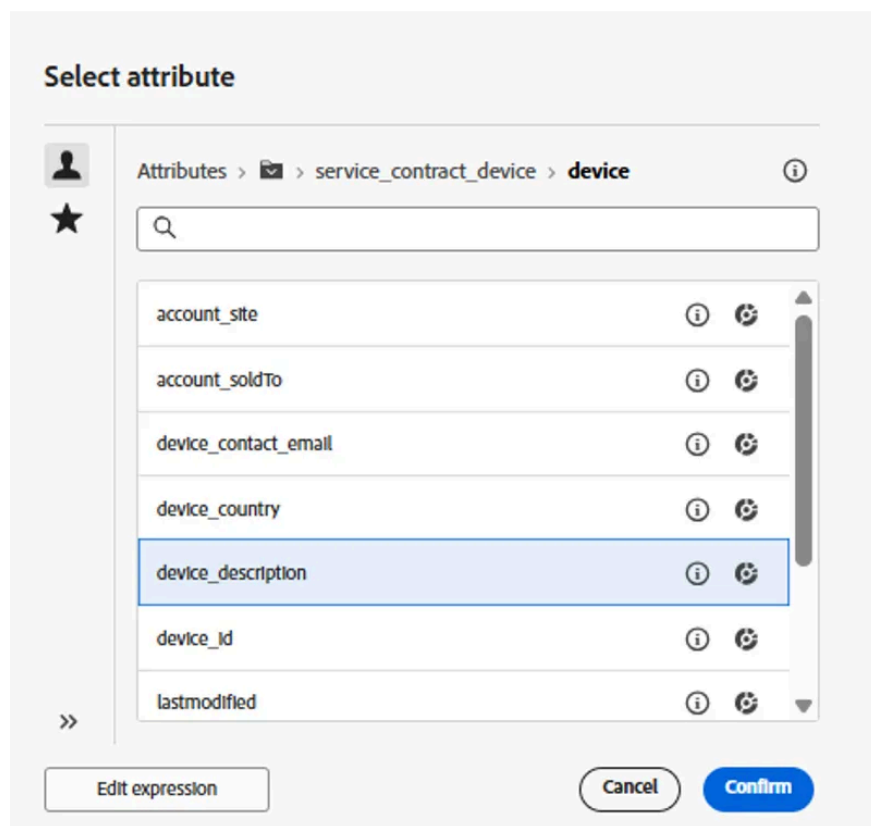
Add personalization data in the email like **many devices** per contract

Highlight

Enrichment of the target with a collection of device, Change dimension, Email personalization

Enrichment of the target

- On the first segment, click on the + icon to add an **Enrichment** activity
- Add the fields that will be used to personalize the email
 - service_contract_end
 - service_contract_name
 - all the devices covered by the contract
- It's possible to add these devices in the target by collecting many records this way
 - Select the path Targeting dimension > service_contract_device > device > device_description



- Keep the option **Collect data** and set the length to 5

▼

service_contract_device

🗑️

Attribute

service_contract_device
(target/service_contract_device)

Select how the data is collected

Collect data

▼

Lines to retrieve (Columns to create)

5

Attributes

+

Add attribute

Attribute 1

device_description...

📄✎

Label

device_description

Alias

🗑️

- Click on **Resume** and get a preview of the results

Preview results Close

🔍

4 of 4

🔧 ↺

Targeting dimension ▼	service_contract_id ▼	service_contract... ▼	service_contract_name ▼	device_description ▼	device_description ▼	device_description ▼	device_description ▼	device_descripti
S-CT-900	S-CT-900	2/28/2026	Premium contract	Surgery microscope 1	Surgery microscope 2	Surgery microscope 3		
S-CT-901	S-CT-901	2/28/2026	Premium contract					
S-CT-910	S-CT-910	2/28/2026	Premium contract	Surgery microscope 1	Surgery microscope 3	Surgery microscope 2		
S-CT-911	S-CT-911	2/28/2026	Premium contract					

- 5 new columns have been added in the target; these 5 columns match 5 devices

The target contains both email addresses and personalization data.

Email messages will be delivered to all the recipients that are in this list.

Email messages will be personalized with all the data that have been added in this list.

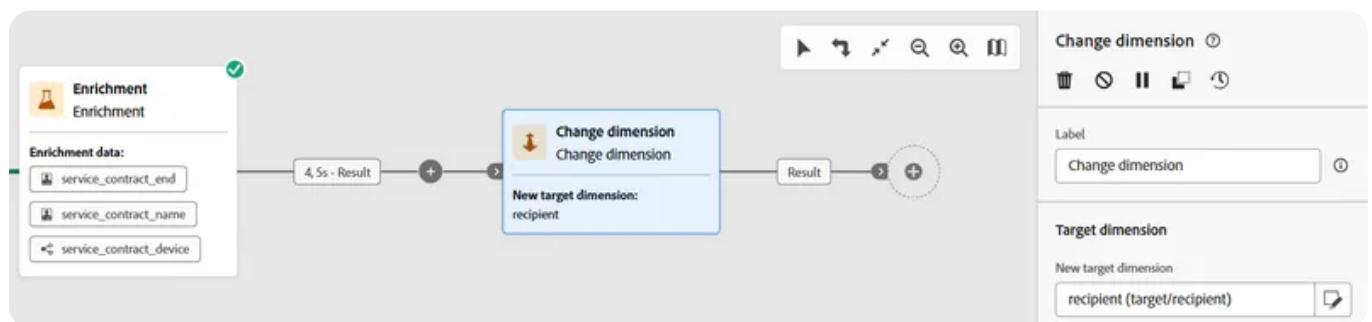
Change the targeting dimension

Notes about "Change dimension"

The **Change dimension** activity allows you to change the targeting dimension as you are building an audience. It shifts the axis depending on the data template and the input dimension. For example, you can switch from the contracts dimension to the clients dimension.

This step is **required** to prepare the target in order to let the product deliver messages (email, push, SMS). The engineers are working to improve this process by maybe removing this step.

- Click on the + icon to add an **Change dimension** activity
- Select Recipient as the new target dimension



- Click on the **Resume** button and get a preview of the results

Preview results

[Close](#)

Targeting dimension	crmId	service_contract_id	service_contract...	service_contract_name	DaysDiff(service...	device_description	device_desc
658NiTeo	658NiTeo	S-CT-910	2/28/2026	Premium contract	33	Surgery microscope 1	Surgery micr
658NiTeo	658NiTeo	S-CT-911	2/28/2026	Premium contract	33		
6RiuGqHY	6RiuGqHY	S-CT-900	2/28/2026	Premium contract	33	Surgery microscope 1	Surgery micr
6RiuGqHY	6RiuGqHY	S-CT-901	2/28/2026	Premium contract	33		

The new targeting dimension is now Recipient

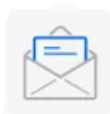
The first column of the target is the **crmId** field that has been tagged as the identity field in the schema, used to make a reconciliation with profiles in the Real-time Profile Store.

Personalize an email message

- Click on the + icon to add an **Email** activity
- Click on **Edit email** button
- In the **Actions** tab, select the surface named **config-email-marketing-service_contract**

Properties **Actions** Content Schedule

Actions



Email

[Edit content](#)

Email configuration * ?

config-email-marketing-service_contract

Select or create new configuration

Channel configuration

The `config-email-marketing-service_contract` channel has been set to deliver one email per contract. This design disable a deduplication on the recipient email address.

It's possible to configure this channel to deliver the message by using the email address set in the contract.

Execution details

Journey & Action

Orchestrated campaign

☒ Enabled

Execution dimension

Deliver one message per: *

☐ Target Dimension ☒ Target + Secondary Dimension

Profile Target Dimension *

recipient - email

Secondary Dimension *

service_contract

Execution Address ?

Source

☐ Profile ☐ Target Dimension ☒ Secondary Dimension

Delivery address

service_contract.service_contract_contact_email

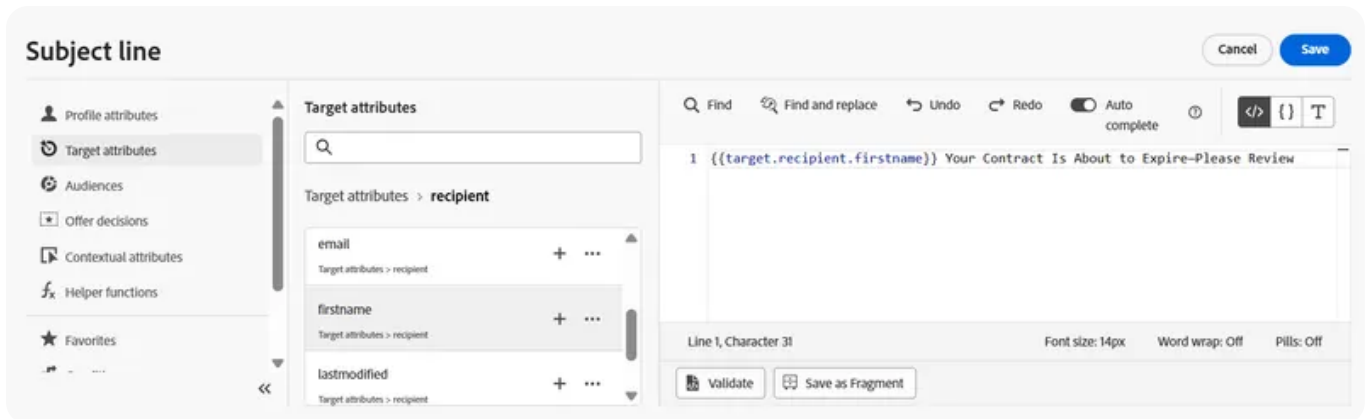
- Click on **Edit content** button
- Click on **Content template** button, then **Apply content template**
- Select the template named `[Example] Contract Expiration Alert Message`
- Click on **Confirm** button to apply the template
- Edit the subject line to replace `[FIRST_NAME]` by a personalization field

Subject line

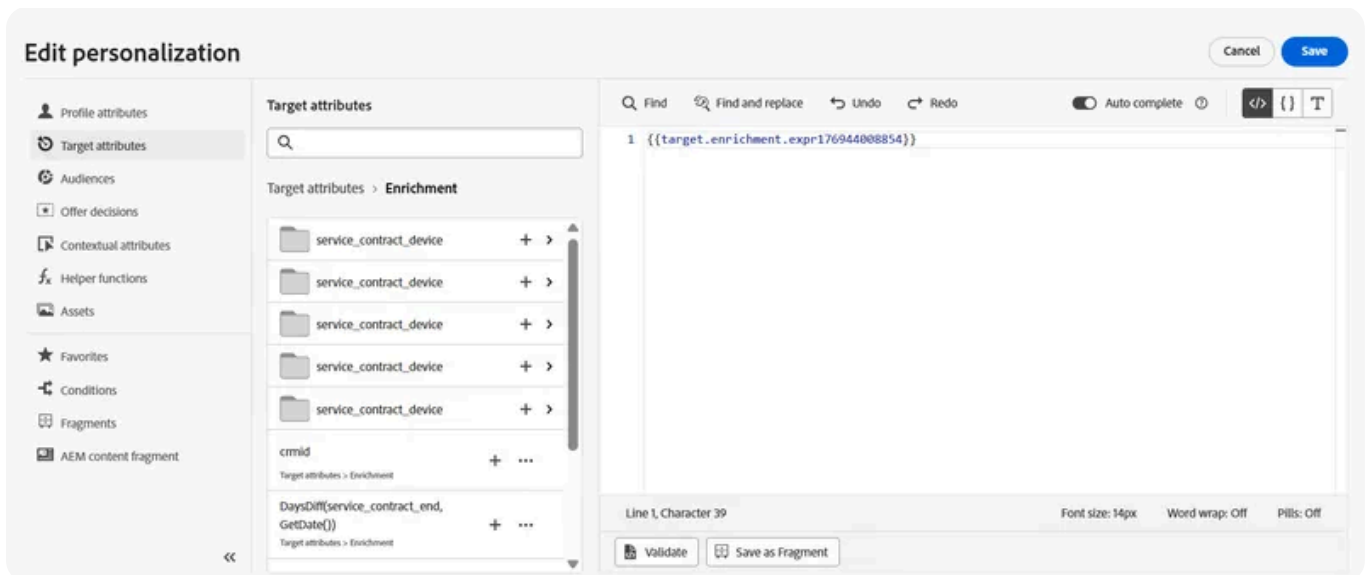
[FIRST_NAME] Your Contract Is About to Expire—Pleas...

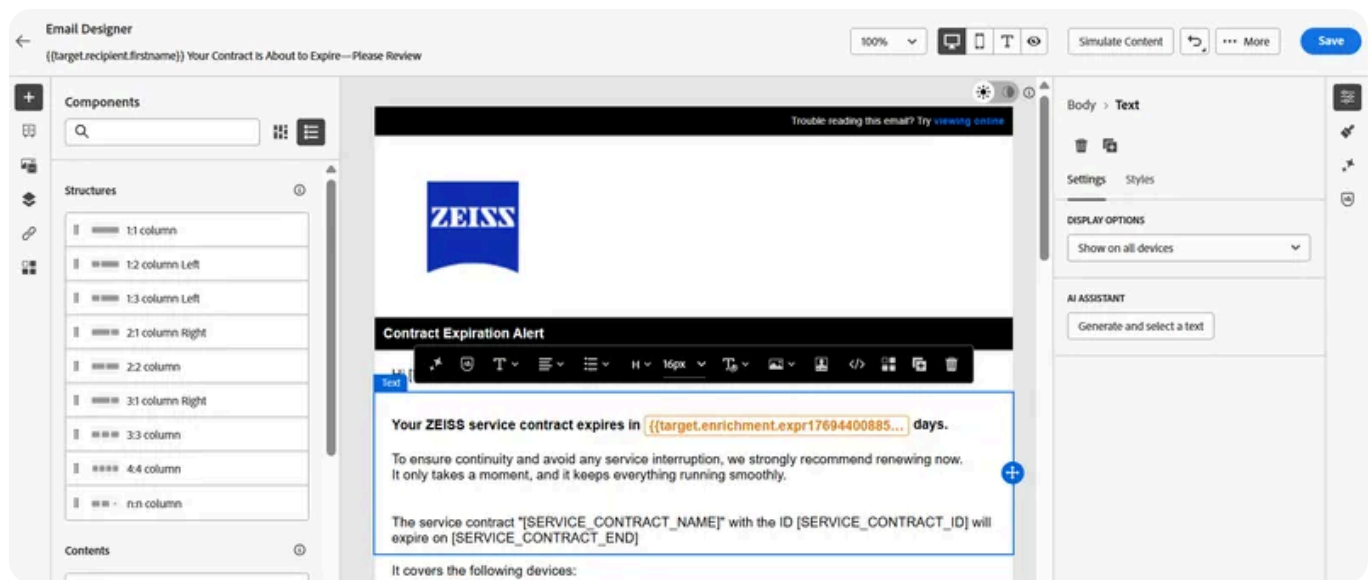


- Edit the subject line to replace [FIRST_NAME] by a personalization field located in
Target attributes > recipient > firstname



- Click on **Save**
- Click on **Edit email body** and replace personalization fields with **Target attributes**
 - For instance, for the expiration days, the path is Target attributes > Enrichment > DaysDiff(service_contract_end, GetDate())





- Repeat the personalization task with devices (1..5)



Contract Expiration Alert

Hi `{{target.recipient.firstname}}`,

Your ZEISS service contract expires in `{{target.enrichment.countExpirationDays}}` days.

To ensure continuity and avoid any service interruption, we strongly recommend renewing now. It only takes a moment, and it keeps everything running smoothly.

The service contract "`{{target.enrichment.service_contract_na...}}`" with the ID `{{target.enrichment.service_contract_id}}` will expire on `{{target.enrichment.service_contract_en...}}`

It covers the following devices:

Text

`{{target.enrichment.service_contract_de...}}` +

`{{target.enrichment.service_contract_de...}}`

`{{target.enrichment.service_contract_de...}}`





Service contract coverage is important to work reliably and efficiently with your device from ZEISS.

To renew your contract, please reach out to the ZEISS rep in your country.

[Renew Contract Now!](#)

The email is personalized with data added in the Target, attributes from the targeting dimension and attributes from the secondary dimension (service_contract)

Follow the same process to deliver a reminder email to recipients that belongs to the second segment. It's possible to Copy/Paste the activities to save time.

Step 3 - Save the Target as an Audience

Goal

Save the **Target** as an **Audience**

An Audience can be activated to CRM destination, as usual in AEP RT-CDP

Features

Enrichment, Deduplicate, Save audience

Enrichment of the target

- Go to the third segment and click on the + icon to add the **Enrichment** activity
 - Add the `service_contract_name`
 - Add the `service_contract_contact_email`
- Preview the results and look at the duplicated emails

Preview results Close

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Targeting dimension	service_contract_id	service_contract_name	service_contract_contact_email	DaysDiff(service_contract_end, GetD...
S-CT-910	S-CT-910	Premium contract	schnebbe+20260115@adobetest.com	32
S-CT-911	S-CT-911	Premium contract	schnebbe+20260115@adobetest.com	32
S-CT-001	S-CT-001	Standard contract	pascalreder@zeiss.com	93
S-CT-002	S-CT-002	Preventive contract	alessio.brambilla@zeiss.com	124
S-CT-003	S-CT-003	Premium contract	sarvesh.mulay@zeiss.com	185
S-CT-900	S-CT-900	Premium contract	bouessay+20260115@adobetest.com	32
S-CT-901	S-CT-901	Premium contract	bouessay+20260115@adobetest.com	32

Deduplication

- Add the **Deduplication** activity
 - Add the attribute `service_contract_contact_email` as a field to identify duplicates
 - Set the deduplication this way

▼ **Deduplication settings** ?

Duplicates to keep

1

Deduplication method

Using an expression ▼

Keep records for which the specified expression has the smallest or largest value.

Expression

DaysDiff(service_contract_end, ... 

Sort

Ascending (smallest values first) ▼

- Click on **Resume** , preview results and check that duplicates have been removed

Save the audience

- Add the activity **Change dimension** to shift from Contracts to Recipient targeting dimension
- Add a **Save audience** activity
 - Set the name to [your name] Contract will expire today
 - Set the profile mapping field to: recipient - crmid
 - Add these attributes (audience mapping):
 - service_contract_name
 - service_contract_id

The Target cannot be saved as an Audience in the simulation mode. The Orchestrated Campaign flow has to be published in order to save the audience. The next paragraph describes the audience that will be created by the Orchestrated Campaign engine.

- In the menu on the left side, under **Customer**, click on **Audiences**
- Click on the audience named **Contract will expire today**

Audiences > Contract will expire today Activate to destination Apply access labels

Detail

Audience summary

ID# a82fbb4-6144-44d3-8910-b0a8dc9d7b05

Contract will expire today

Description

Origin

Campaign Orchestration

Access labels

None

Tags

None

Lifecycle state

Published

Edit properties

Ingestion details

Dataset name	Records ingested
Contract will expire today	5
Dataset batch	Records failed
01KFZVB356H3YTWND8VVKCSADE	0
Profile batch	New profile fragments
6978c515bee4262b5edb27aa	-
Schema	Existing profile fragments
Contract will expire today	-
Data expiration	Status
29 days	Processing

Activated destinations



You don't have any destinations yet.

Connect to a destination to target your audiences to all your marketing channels.

[Activate to destination](#)

- Click on the dataset name and click on the **Preview dataset** button

Contract will expire today Close Advanced query editor

Search by field

Schema Structure

- contract_will_expire_today
 - ABC recipient_crmid
 - ABC service_contract_name
 - ABC service_contract_id

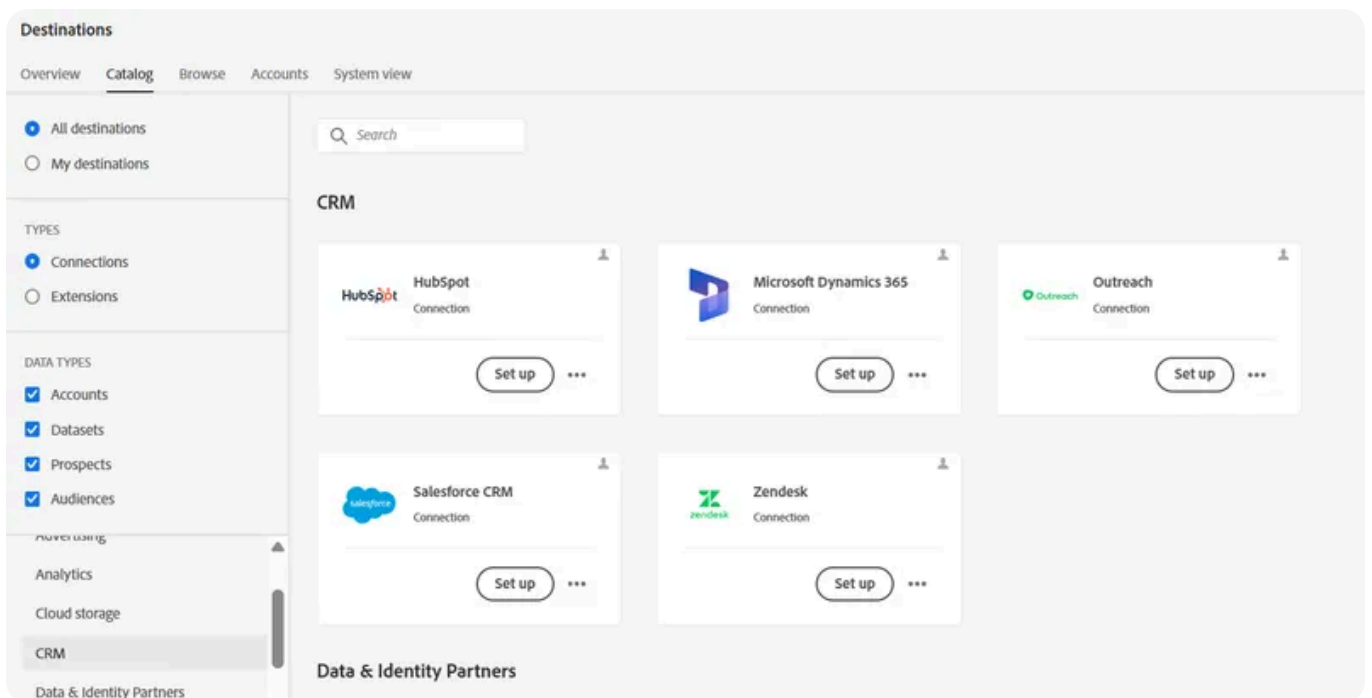
```
1 select * from contract_will_expire_today limit 100;
```

Results

☐	ROWNUM	☐	RECIPIENT_CRMID	☐	SERVICE_CONTRACT_NAME	☐	SERVICE_CONTRACT_ID
☐	1		zld-002		Standard contact		S-CT-001
☐	2		zld-005		Preventive contract		S-CT-002
☐	3		zld-006		Premium contract		S-CT-003
☐	4		6RiuGqHY		Premium contract		S-CT-900
☐	5		6sBNiTeo		Premium contract		S-CT-910

CRM destinations

- In the menu on the left side, under **Connections**, click on **Destinations**
- Go to the **Catalog** tab and select the CRM categories to see all the supported CRM destinations



Step 4 - Schedule and Publish

Goal

Schedule the execution of the Orchestrated Campaign flow

Publish the messages templates

Publish the exportation of data (Save audience)

Highlight

It's possible to execute the flow several times per day

Publish is a restricted feature and requires a permission.

Schedule

- Click on the **As soon as possible** button
- Schedule the execution of the flow several times per day

Scheduler ?

Execution frequency

Several times a day

Selected hours

Periodic

Hours

6:00 AM

Hours

9:00 AM

Hours

12:00 AM

+ Add hour

Time zone

Coordinated Universal Time

Day of the month

Cancel

Confirm

Publish permission

- The **Publish** button is restricted to the operators who have the **Publish Orchestrated Campaigns** permission

Orchestrated Campaigns ?

6 of 6 selected

View Orchestrated Campaigns Reports

View Orchestrated Campaigns Admin

Manage Orchestrated Campaigns Admin

Manage Orchestrated Campaigns

Publish Orchestrated Campaigns

View Orchestrated Campaigns

Clear all

Congratulations on successfully completing the exercise!

This lab focussed on these topics:

- Multi-Entity & Relational Data Modelling/Processing
- Orchestrated Campaign Logic
- Audience Creation & Ad-hoc Analysis
- Data-Driven Email Activation & Templates

6. Lab 4: Device upgrade and cross sell

Focus area

Adobe Journey Optimizer

Features

Orchestrated Campaign - Ad Hoc Targeting

Activation to Social Media destination

Data driven email activation

Personalization of web site

Difficulty

Easy

Use case description

As a Marketer, I have to make the promotion of the new ARTEVO 850, which is a device that belongs to the Cataract Workflow products. I want to identify contacts linked to accounts or clinics that already own ARTEVO 750 or ARTEVO 800 device and to inform them that the new improved ARTEVO 850 has been released, with an email message, a social media campaign and also with a personalized web banner on ZEISS web site.

I also want to include cross-selling offers of additional products related to Cataract Workflow like IOL MASTER 7000, CIRRUS 6000 or ATLAS 500 devices in the email message.

Ressources

- Data engineers have designed a relational data model with devices owned by accounts
- A Web agency has provided:
 - a Web banner to make the promotion of ARTEVO 850
 - an email with a placement to display cross selling products

Solution Design

One possible solution design is:

- Use **Orchestrated Campaign** to create an audience of accounts who already owns an ARTEVO device
 - Enrich this audience with all the devices already bought by the customer in order to propose a Cross Selling product that the customer doesn't have
- Activate this audience to social network like Meta
- Use a **Regular Journey** to activate this audience to email and web channel
 - Place a Cross Selling product inside the email
- Design a regular journey is a good practice to manage in the same way inbound and outbound channels:



Currently, inbound channels like Web channel or Content Card are available only with a regular journey, not with an Orchestrated Campaign.

In this design, the email is delivered by a regular journey; it's also possible to deliver the email with the Orchestrated Campaign flow as done in previous lab.

This lab highlights a tip to leverage enrichment attributes of an audience, inside an email: it's possible to personalize the email by defining conditions based on the attributes provided by the audience, for instance to select the best cross-selling product interesting for the profile.

Step 1 - Ad Hoc Targeting

Goal

Create the audience "Profiles interested by ARTEVO 850".

Enrich the audience with other devices already owned by the account.

Highlight

Build audience, Enrichment of the audience with an aggregation of devices

One way to do it is to follow these steps:

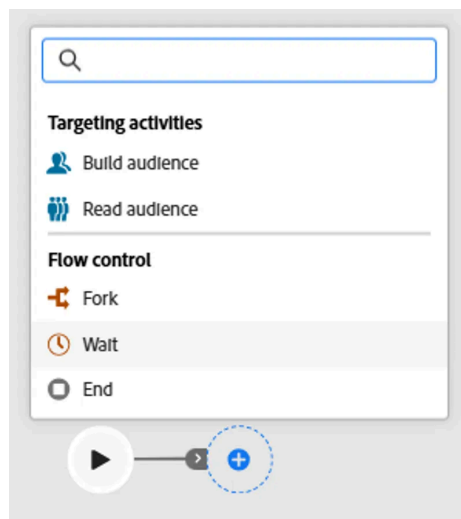
1. Create a new Orchestrated Campaign
2. Build an audience of devices
3. Change dimension from device to recipient
4. Enrich the audience of recipients with an aggregation of device, except ARTEVO ones
5. Save the audience

Create a new Orchestrated Campaign

- In the menu on the left side, under **Campaigns**, click on **Orchestration**
- Click on the **Create campaign** button
- Select **Orchestration - Marketing** and click on **Confirm**
- Set the name to [your name] ARTEVO 850 launch
- Click on **Save**

Filter devices

- Click on the + icon to display the list of activities



- Select the **Build audience** activity
- Set the Targeting dimension to **device**
- Click on **Create audience** button
- Click on **Add condition**
- Define these 2 criteria:

```
(device_description contains ARTEVO 800)
OR (device_description contains ARTEVO 750)
```

- Click on **Calculate** to get a count of records
- Click on **Confirm**
- Click on **Start** to start queries in a simulation mode

Enrichment step

- Add an **Enrichment** activity
- Add enrichment data `device_description` and `device_contact_email`
- Click on **Resume**



Change dimension

- Add an **Change dimension** activity
- Set the new target dimension to **recipient**
- Click on **Resume**
- Click on **Preview results**

Preview results Close

🔍 ⓘ 2 of 2 🔍 ↺

Targeting dimension ▾	crmid ▾	device_id ▾	device_description ▾	device_contact_email ▾
6RiuGqHY	6RiuGqHY	D-009003	ARTEVO 800	bouessay+20260115@adobetest.com
6s8NiTeo	6s8NiTeo	D-009013	ARTEVO 750	schnebbe+20260115@adobetest.com

Enrichment - Aggregation of devices

- Add an **Enrichment** activity
- Add enrichment data
 - Select the attribute in the path `Targeting dimension > Device > device_description`
- Set the option named 'Select how the data is collected' to **Aggregate data**
- Select the aggregate function to **String aggregation**
- Set the alias to `other_devices`
- Click on **Create filter**
- Set the filter to `device_description does not contain ARTEVO`
- Click on **Resume**
- Click on **Preview results**

Preview results Close

🔍 ⓘ 2 of 2 🔍 ↺

Targeting dimension ▾	crmid ▾	StringAgg(device_description,) ▾	device_id ▾	device_description ▾	device_contact_email ▾
6s8NiTeo	6s8NiTeo	Surgery microscope 1,Surgery microscope 2,Surgery microscope 3	D-009013	ARTEVO 750	schnebbe+20260115@adobet...
6RiuGqHY	6RiuGqHY	Surgery microscope 1,Surgery microscope 2,Surgery microscope 3	D-009003	ARTEVO 800	bouessay+20260115@adobet...

Save the audience

- Add a **Save audience** activity
- Set the Audience label to `[Your name] Profiles interested by ARTEVO 850`

- Add Audience Mapping this way

Save Audience ?

Label

Save Audience

Audience label *

Profiles interested by ARTEVO 850

Profile mapping field *

recipient - email

Audience Mappings *

+ Add Audience Mapping

> Recipient_Email

> Device_Description

> Device_Id

> Device_Other_Devices

Source Audience Field

StringAgg(device_description,,)(device/other_devices)

Target Audience Field *

Device_Other_Devices

- In the left menu, go to Customer > Audiences folder and search for the audience named Profiles interested by ARTEVO 850
- Click on this audience, click on the Dataset name, and click on **Preview dataset**

Profiles interested by ARTEVO 850

Close Advanced query editor

Search by field

Schema Structure

profiles_interested_by_artevo_850

- recipient_email
- device_description
- device_id
- device_other_devices

```
1 select * from profiles_interested_by_artevo_850 limit 100;
```

Results

ROWNUM	RECIPIENT_EMAIL	DEVICE_DESCRIPTION	DEVICE_ID	DEVICE_OTHER_DEVICES
1	schnebbe+20260115@adobete...	ARTEVO 750	D-009013	Surgery microscope 1,Surgery microscope 2,Surgery microscope 3
2	bouessay+20260115@adobete...	ARTEVO 800	D-009003	Surgery microscope 1,Surgery microscope 2,Surgery microscope 3

Step 2 - Activate to Social Media - Meta case

Goal

Activate this audience in Social Media space - Meta case

Highlight

Activation of an audience

This is a READ ONLY section: the next paragraphs will give you the information to learn how the activation process works.

Activate profiles for your Facebook campaigns for audience targeting, personalisation, and suppression based on hashed emails.

You can use this destination for audience targeting across Meta's family of apps that are supported by Custom Audiences, including Facebook, Instagram, Audience Network, and Messenger. Selection of the app that you want to run campaign against is indicated at the placement level in Facebook Ads Manager.

Facebook Custom Audiences supports the activation of identities:

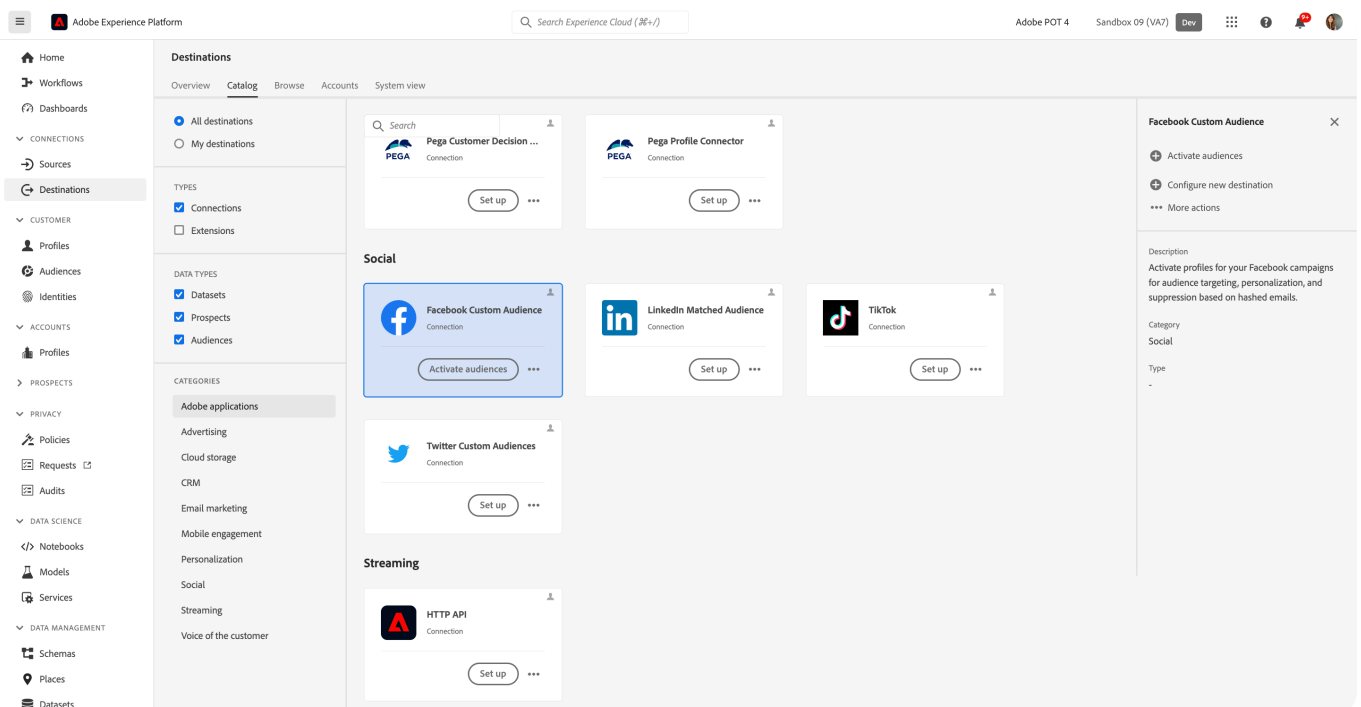
- GAID - Google Advertising ID
- IDFA - Apple ID for Advertisers
- phone_sha256 - Phone numbers hashed with SHA256 algorithm
- email_lc_sha256 - Email addresses hashed with SHA256 algorithm
- extern_id - Custom user IDs

Export Type = Segment Export

Facebook requires that no personally identifiable information (PII) is sent in clear. Therefore, the audiences activated to Facebook can be keyed off *hashed* identifiers, such as email addresses or phone numbers.

Activate Audiences to the Facebook Destination

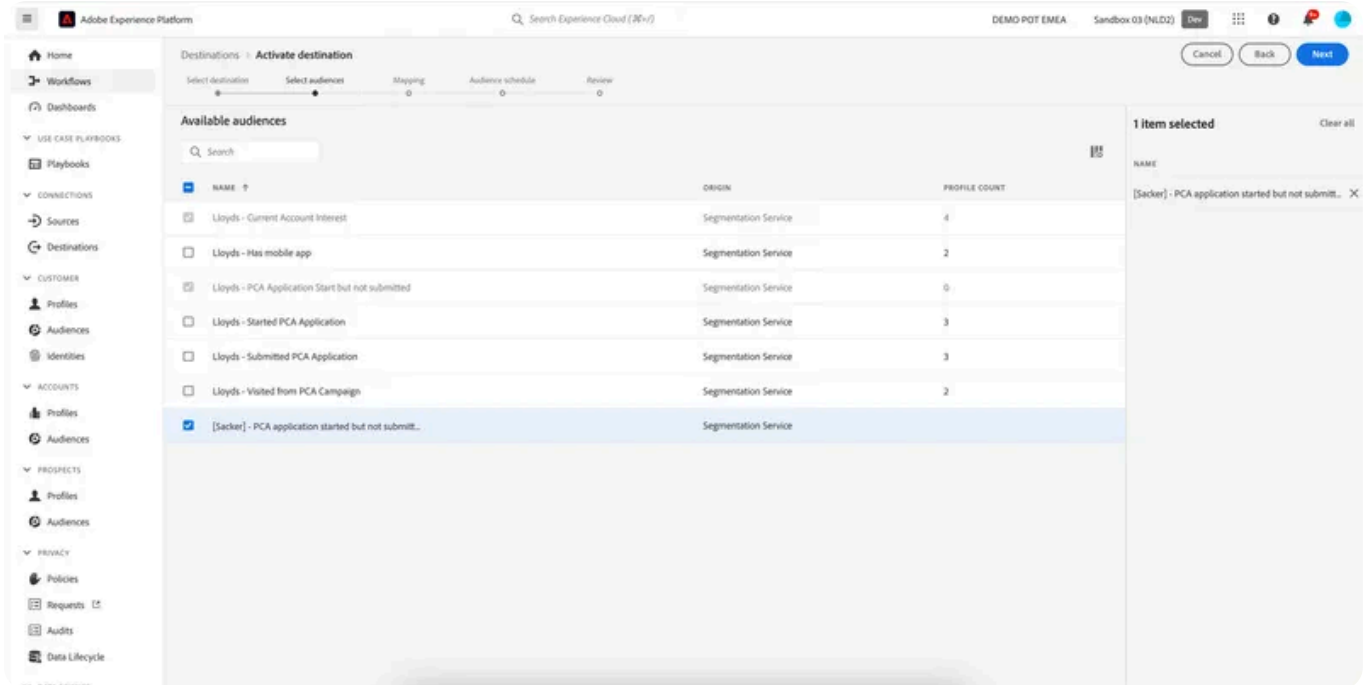
1. In the left rail, click on **Connections** and choose **Destinations**, then go to **Catalog**. You'll then see the Destinations Catalog.
2. In **Destinations**, select **Social**, click the **Activate Audiences** on the **Facebook Custom Audiences** card.



1. Select your Destination and click **Next**.

For this Lab we have already configured the Facebook Destination for our demo account. You can reuse this Account to map your audiences in the Lab: **Facebook Demo Destination**

In the list of available audiences



1. Select on of the Audiences you created in the previous exercise for mapping.
2. Click **Next**.

For the Facebook Custom Audience Destination, you need to specify your **mapping identifiers** between Adobe Experience Platform and Facebook. These will be used to match the profiles in your audiences between platforms.

For this lab we want to use the `Hashed Email ID` as the mapping identifier.

This mapping is already in place for the Bootcamp Facebook Destination, the below steps 1-7 are for information only.

1. On the **mapping** step select **Add new mapping**.
2. We will first specify a **Source Field**, by selecting the arrow next to the input box. This opens our XDM schema where we can choose to select from attributes or Identity namespaces.

3. Select the checkbox **Select identity namespace** and click the **Emails (SHA256, lowercased)** namespace from the list of identities.
4. Click **Select**.

Destinations > **Activate destination** Cancel Back Next

Select source field. ☐ Select attributes ☒ Select identity namespace

DISPLAY NAME	IDENTITY SYMBOL	OWNER	LAST UPDATED	DESCRIPTION
CORE	CORE	-	2019-03-04T08:33:45.455Z	Adobe Audience Manger UUID
ECID	ECID	-	2019-03-04T08:33:45.455Z	Adobe Experience Cloud ID
AdCloud	AdCloud	-	2019-03-04T08:33:45.455Z	Adobe AdCloud - ID Syncing Partner
Emails (SHA256, lowercased)	Email_LC_SHA256	-	2019-03-04T08:33:45.455Z	Email addresses need to be hashed using SHA256 and lowercased. Please also note that leading and trailing spaces need to be trimmed before
Phone (E164)	Phone_E164	-	2020-08-21T07:47:34.636Z	Namespace for raw phone numbers in E164 format. + sign is required
Google Ad ID (GAID)	GAID	-	2019-03-04T08:33:45.455Z	This datasource is associated to a Google Ad ID
Apple IDFA (ID for Advertisers)	IDFA	-	2016-10-20T20:02:29.000Z	Apple ID for Advertisers. See: https://support.apple.com/en-us/HT202074 for more info.
Apple Push Notification service	APNS	-	2019-06-03T22:14:06.005Z	Identities collected via Apple for Push notification Service
Firebase Cloud Messaging	FCM	-	2019-06-03T22:14:21.630Z	Identities collected via Google for Push notification Service
Adobe Analytics (Legacy ID)	AAID	-	2019-03-04T08:33:45.455Z	Adobe Analytics (Legacy ID)
Email	Email	-	2019-03-04T08:33:45.455Z	Email
Windows AID	WAID	-	2019-03-04T08:33:45.455Z	Windows AID
TNTID	TNTID	-	2019-03-04T08:33:45.455Z	Adobe Target (TNTID)
Google	Google	-	2019-05-01T02:07:39.431Z	-

Cancel Select

Then, we do the same for the **Target Field**.

1. Select the Hashed email ID (**email_lc_sha256**) from the Facebook options.
2. Click **Select**.

Destinations > **Activate destination** Cancel Back Next

Select target field. ☒ Select identity namespace

DISPLAY NAME	IDENTITY SYMBOL	OWNER	LAST UPDATED	DESCRIPTION
gaid	-	-	-	-
phone_sha256	-	-	-	-
idfa	-	-	-	-
extern_id	-	-	-	-
email_lc_sha256	-	-	-	-

Cancel Select

Your mapping should now look like:

The screenshot shows a web interface for activating a destination. At the top, there's a breadcrumb 'Destinations > Activate destination' and three buttons: 'Cancel', 'Back', and 'Next'. Below this is a progress bar with five steps: 'Select destination', 'Select audiences', 'Mapping' (current step), 'Audience schedule', and 'Review'. The 'Mapping' section has a 'Filter fields' input, an 'Add new mapping' button, and a 'Clear all mappings' button. A mapping is shown between 'SOURCE FIELD' and 'TARGET FIELD'. The source field is 'IdentityMap: Email_LC_SHA256' and the target field is 'Identity: email_lc_sha256'. There are icons for adding and removing mappings.

1. Click **Next**.

On the **Audience Schedule** step,

1. Select **Directly from customers** in the **Origin of Audience** drop down option.
2. Click **Next**
3. Finally, on the **Review** page, click **Finish**.

Your audience is now activated to Facebook

Exported Data

For Facebook, a successful activation means that a Facebook custom audience would be created programmatically in **Facebook Ads Manager**. Audience membership in the audience would be added and removed as users are qualified or disqualified for the activated audiences.

The integration between Adobe Experience Platform and Facebook supports historical audience backfills. All historical audience qualifications get sent to Facebook when you activate the audiences to the destination.

Step 3 - Activate to email and place X Sell offers

Goal

Make the email promotion of the new ARTEVO 850 device and optimize the cross-selling products to include in the message.

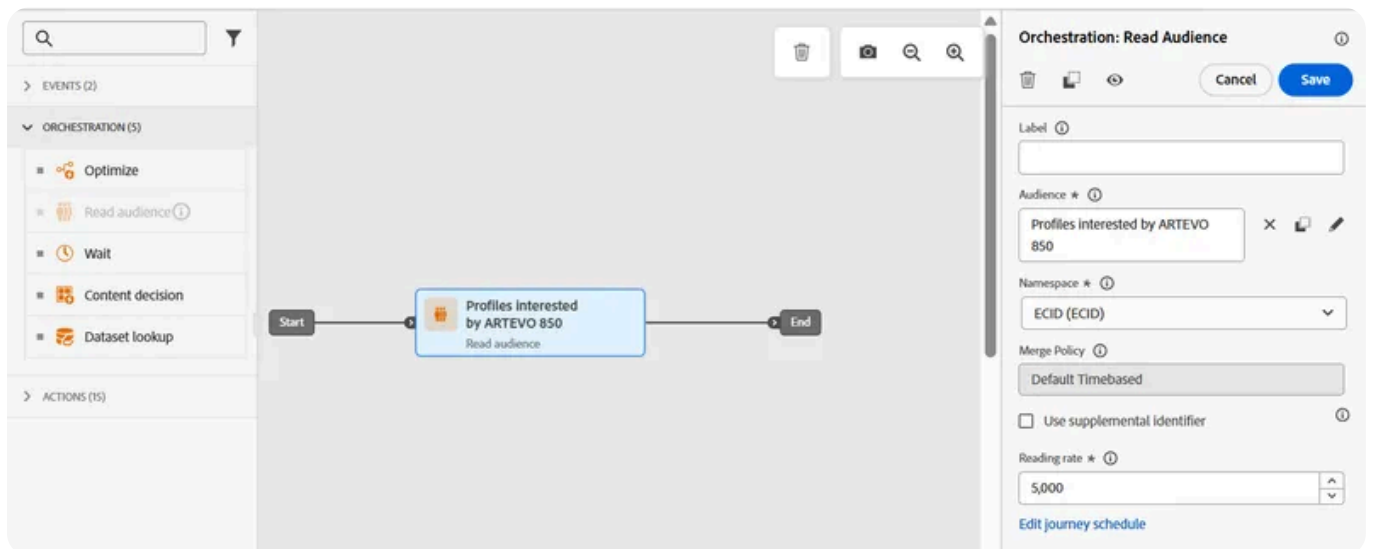
Highlight

Email personalization

Optimize the profile journey

Create a regular Journey with Email

- In the menu on the left side, under **Journey management** click on **Journeys**
- Click on the **Create Journey** button
- Set the name to [your name] ARTEVO 850 upgrade and Cross Selling
- Click on **Save**
- Add a **Read audience** activity
 - Select the audience named Profiles interested by ARTEVO 850
 - Set the namespace to ECID

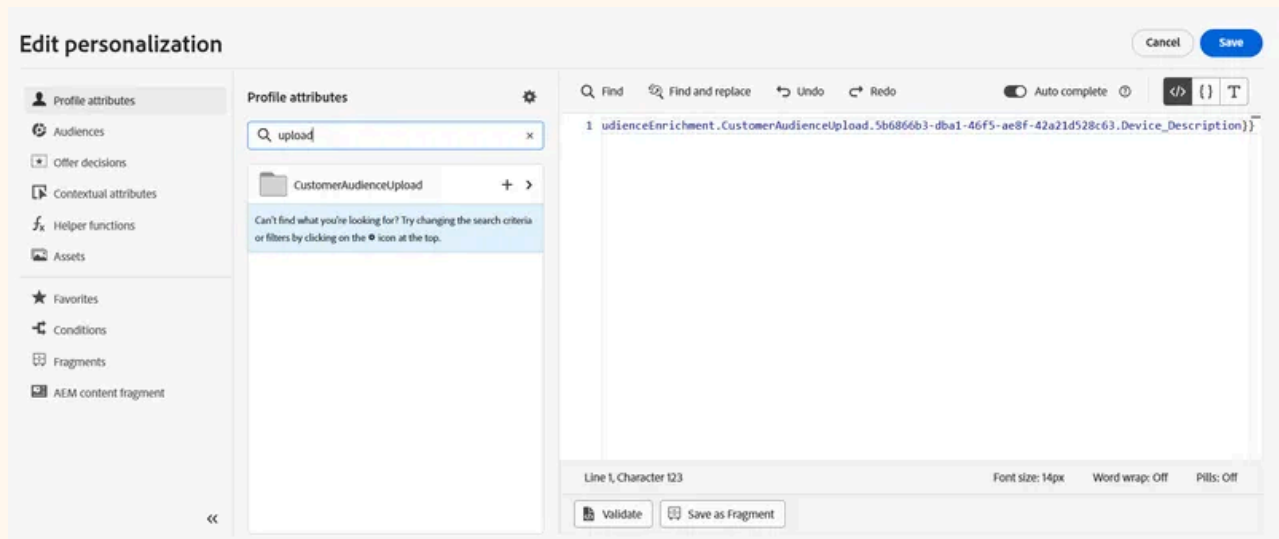


- Add an **Email** activity
 - Set the name to ARTEVO 850 Promotion
 - Set the Category to Marketing
 - Set the Email configuration to config-email-marketing
 - Click on the button **Edit content**

- Click on the button **Content template, Apply content template**
- Select the template named [Example] ARTEVO 850 Promotion
- Set the subject line to New ARTEVO 850 is available!
- Click on the button **Edit email body**
- Edit personalization
 - Replace [FIRST_NAME] by `{{profile.person.name.firstName}}`
 - Replace [DEVICE_NAME] by `{{profile._demopotemea.audienceEnrichment.CustomerAudienceUpload...Device_Description}}`

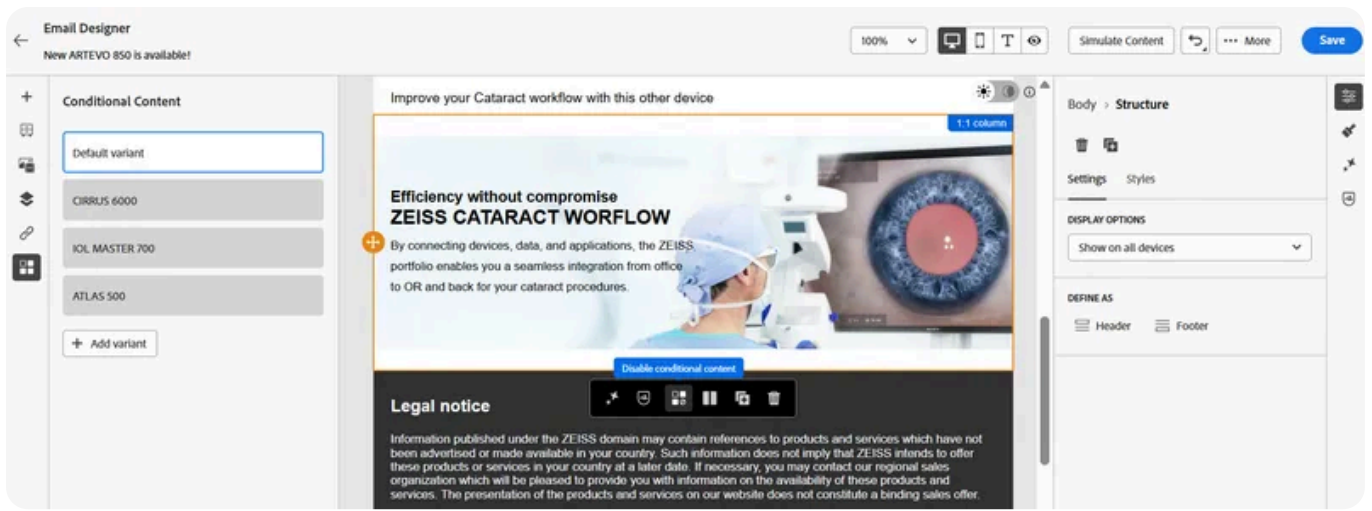
Tip

Search for the word **upload** to find audience enrichment attributes

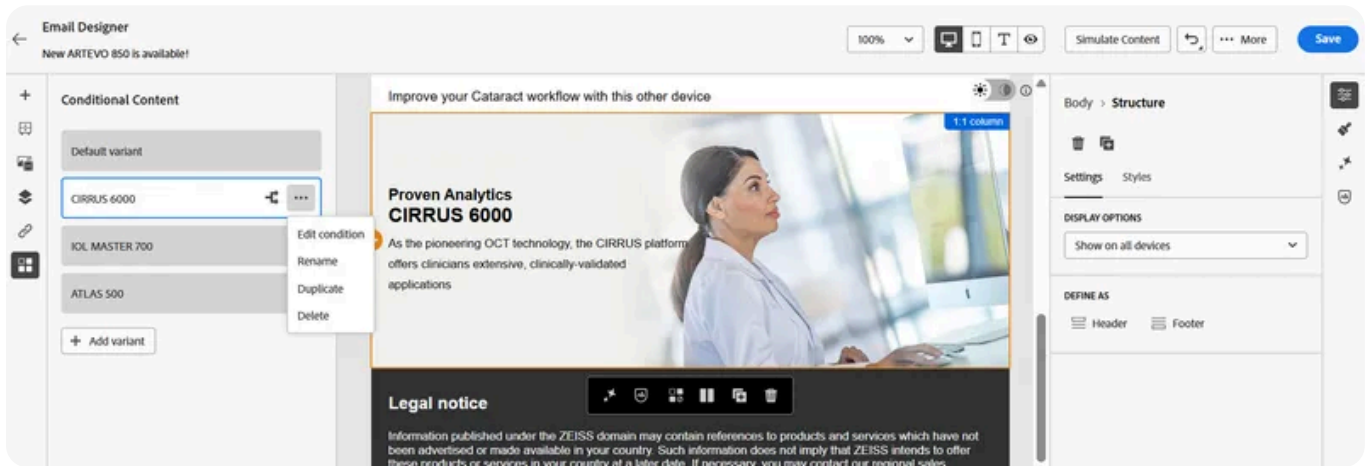


Set up rules to display the cross-selling offer

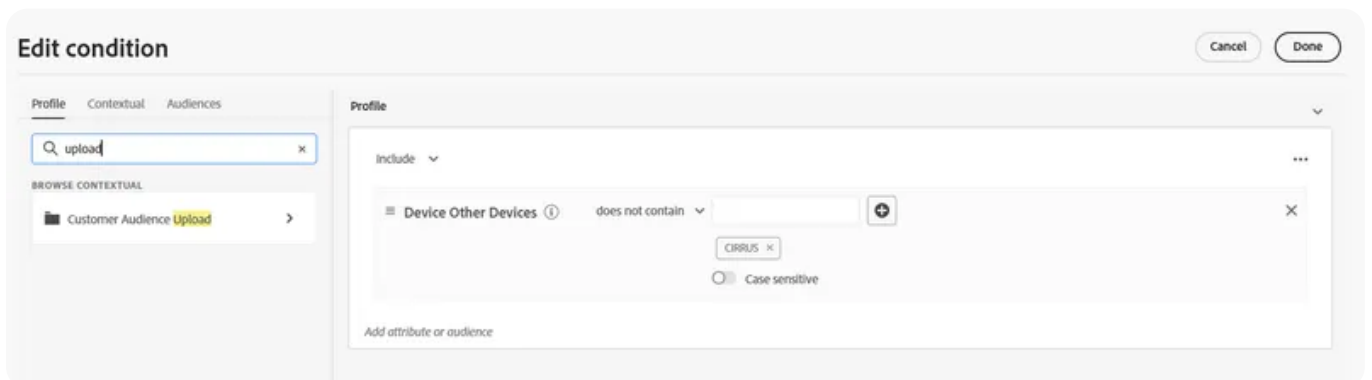
- Look at the placement used to display the cross-selling product
 - The orange border of the block means that **conditional content** has been enabled
 - In the left panel, multiple variants have been defined



- Select the CIRRUS 6000 variant
- Click on **Edit condition**



- The condition is based on the value of an attribute provided by the audience
 - That means: display the CIRRUS 6000 block if the customer doesn't already own a CIRRUS device



Your audience is now activated to an Email.

The email is personalized with audience and profile attributes.

Step 4 - Activate to Web

Goal

Profiles who have received the ARTEVO 850 promotion email will visit the ZEISS web site. The goal is to personalize the web site by changing the hero banner with an ARTEVO 850 ad.

Highlight

Web personalization

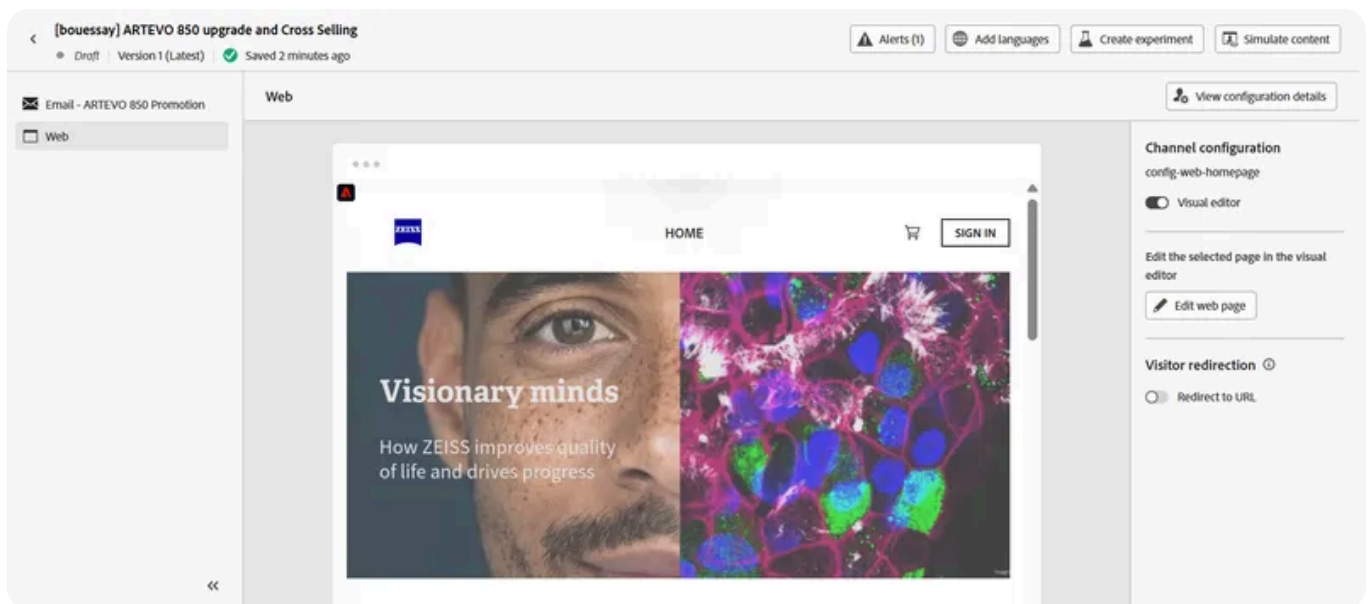
Add a Web activity in the same journey

- Add a **Web** activity

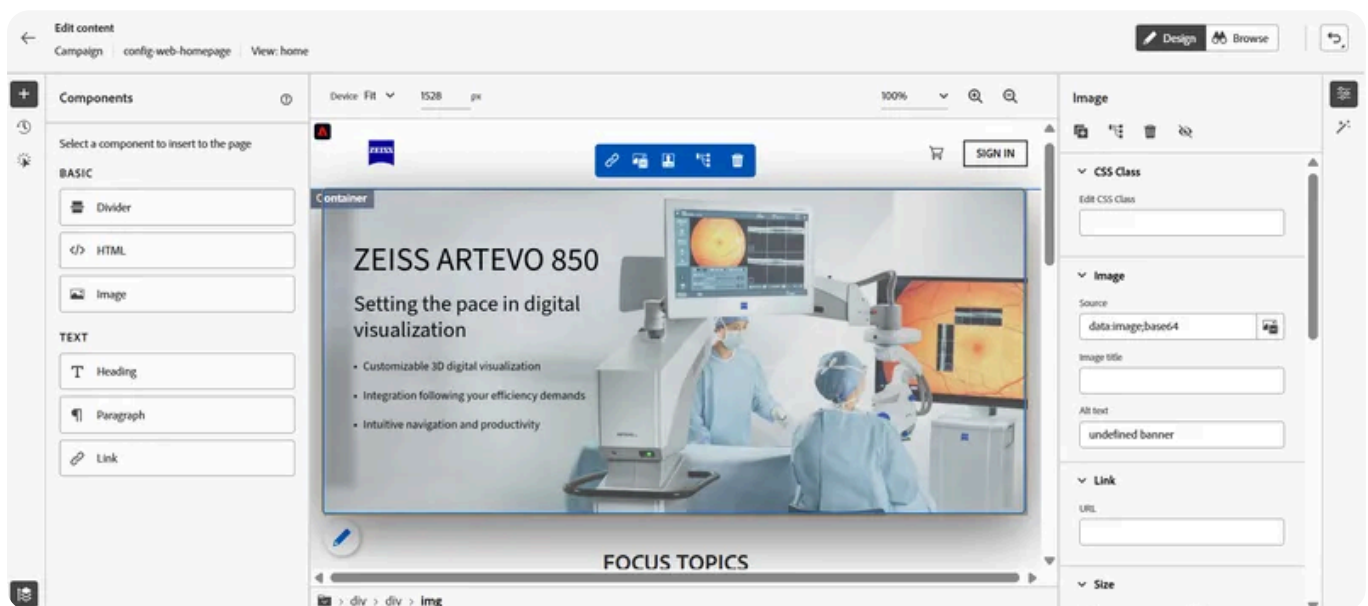
The **Web** activity is automatically added with a **Wait** activity. The journey has to be configured to define how long the Web banner will be displayed. By default, the Wait activity is proposed; it's also possible to define this period by using an **Event** or an **Audience Qualification** activity instead of a Wait.



- Set the Web configuration to `config-web-homepage`
- Click on the **Edit content** button



- Click on the button **Edit web page**
- Replace the main image by the ARTEVO 850 banner



The web site is now personalized, it will display ZEISS ARTEVO 850 ad for all the visitors who belong to this audience.